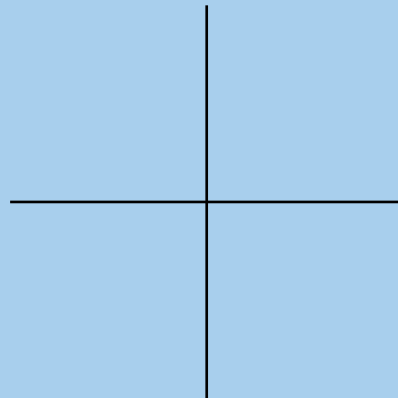


European Federation of Pharmacy Chains



Annual report 2021

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Foreword

Letter from the EFPC Head of Executive Board

Dear Friends,

This Annual Report summarizes activities carried out by the European Federation of Pharmacy Chains (EFPC) in 2021. The pharmacies our organization represents were among the front-line providers of healthcare during the pandemic that began in the spring of 2020. They retained this status in the year that followed. On behalf of the entire sector, I am pleased to say that pharmacies once again stood up to the challenges they continued to face during the reported period, and strengthened their authority among the general public. This fact is clearly evidenced by a representative survey carried out in the Czech Republic, one of the EFPC member states.

The continuing pandemic brought to the forefront the indispensable nature of the European Federation of Pharmacy Chains. The organization grew by the addition of another member, Serbia, and organized its second international conference, following the cancellation of the event in 2020 due to pandemic-related risks. In March 2021, a virtual conference was held to provide the participants with a platform to debate various issues, including the sector's experience with the pandemic, as evidenced by the event's title: Pharmacy Care – Beyond Pandemic. A live video link between virtual studios in Bucharest and Prague posed a challenge, which, however, the EFPC handled with a plumb. The chosen format proved attractive for the speakers and the audience alike.

As in the preceding year, most communication among EFPC members in 2021 was carried out on a long-distance basis, but the federation's members once again demonstrated their ability to cooperate effectively, underscoring the fundamental quality that allows the EFPC to pursue its mission.



Daniel Horák, Head of Executive Board, EFPC

In the fall, the EFPC took part in the Economic Forum held on an attendance basis in Karpacz, Poland. The federation was represented by its Executive Director who delivered a presentation advocating a liberal approach to the operation of pharmacies and to the provision of pharmacy services in conformity to one of the fundamental principles for the defense of which the EFPC has been established.

Considering that this foreword is being written in 2022, I am happy to report that the EFPC has continued its activities into this year. We are entering the forthcoming period with new ambitions. Based on the experience with the EFPC's operations thus far, I am confident that we will succeed in fulfilling all of them. We are greatly encouraged by being able to rely on the high professionalism of pharmacy chain staff and the quality of services they provide to customers. The added value that pharmacy chains contribute to the healthcare systems in individual countries is without any doubt a highly important factor. In the upcoming year, the EFPC will continue to do its utmost to inform both professionals and the general public of issues relating to the pharmacy sector.

Daniel Horák

Head of the Executive Board, EFPC

Membership

EFPC Members and Observers in 2021

As we declared in 2020, the Serbian association's membership was a top priority for Board members in the previous period. Now, we are proud to announce the goal has been achieved. Since July 2021, the Association of Private Pharmacy Chains Belgrade has become a regular member of the EFPC. The Serbian association, right now the only non-EU member, is bringing the EFPC a new opportunity to get familiar and focus on foreign market issues outside the EU.

Despite some differences, we are happy to have found a common interest in the new pharmacy services and their expansion, especially focused on flu vaccination in pharmacies becoming along-term goal of the EFPC.

In 2021, the first year had passed since the first COVID-19 cases were identified in Europe, and it changed some of the plans we had. Communication with potential members went online due to the ongoing pandemic. Travel restrictions were imposed. Also, some of the links had been interrupted due to management changes in the pharmaceutical chains.

At the end of year, communication with the Croatian pharmacy chains had recovered. But due to the complexity of the ownership system in Croatia, we are going to continue discussions about Croatian membership in forthcoming years.

Federation members

Membership within the EFPC is open to countries in Europe





Marija Marković Golubović and Daniel Shull
Representants of Association of Private Pharmacy Chains Belgrade



The European Federation of Pharmacy Chains grows after the Serbian pharmacy association joins the ranks of its members

Serbia's Association of Private Pharmacy Chains Belgrade became the sixth member country of the European Federation of Pharmacy Chains (EFPC) in June 2021. Serbia has joined the Czech Republic, Slovakia, Hungary, Romania, and Poland, which became aregular member last year. The EFPC now represents more than 6 196 pharmacies and 34 500 pharmacy specialists in Central and Eastern Europe.

Serbia's Association of Private Pharmacy Chains Belgrade represents over 2 800 professional pharmacists and 646 pharmacies. That accounts for 20 % of the entire Serbian pharmaceutical market. Even though Serbia's adhesion to the EFPC has for along time been complicated by the COVID-19 pandemic and the fact that Serbian government offices were functioning on alimited basis, the registration process and grant of membership was in the end successfully completed. "The Serbian association held an observer status in the EFPC for quite some time. Thanks to that, its delegates are very well familiar with our activities and visions. In fact, they have taken part in formulating many of them together with regular members. An example is the ApaVision project carried out in 2020, where the Serbian association was represented by Marija Marković Golubović in adebate about the European pharmacy sector," commented EFPC's Executive Director Zdeněk Blahuta.

For Serbia's Association of Private Pharmacy Chains Belgrade, the greatest benefit of its EFPC membership is being able to share experience from the pharmacy sector with other national associations. The main topic contributed by the Serbian association to the EFPC is defining the need for new services in Serbian pharmacies based on patient demand.

„Because the legislative definition of pharmacy services in Serbia covers only some of the basic services and the dispensation of pharmaceuticals it is essentially the only important service recognized under the law, we want to use our membership in the EFPC as a springboard for a discussion about other and additional pharmacy services and their reimbursement. Together with the Chamber of Commerce and the Chamber of Pharmacists, we have been trying to change the situation for a long time, and the EFPC’s support and the experience of our colleagues from other member countries will be very valuable for us,” explained Marija Marković Golubović, Director of Serbia’s Association of Private Pharmacy Chains Belgrade. “We are currently trying to get an approval for a pilot project of flu vaccination in pharmacies. We have the support of various organizations, including universities, and we’re now only waiting for a response from the authorities,” added Marković Golubović.

Serbia’s admission to the EFPC is welcomed by all EFPC’s members, as the country’s membership application received widespread support. “We are happy to be able to help our Serbian colleagues in their efforts to have new reimbursed services introduced in pharmacies and to share with them our experience with their delivery. At the same time, if our Serbian counterparts succeed in pushing through the new pharmacy services, they can serve as a model for other countries, where supplementary services are presently not provided, even though doing so has the potential to lessen the burden placed on the public healthcare sector. An example of that is Poland, where there is a lasting shortage of general practitioners, especially in rural areas, and where allowing pharmacies to deliver certain services would be a logical step,” explained Chairman of the EFPC Executive Committee Daniel Horák.

If Serbia succeeds in carrying out the in-pharmacy vaccination pilot project, it will be the second EFPC member country where the law permits providing this service in pharmacies.

- 6 200 pharmacies
- 34 500 pharmacy experts
- 6 members

Czech Republic:

- Number of public pharmacies: 2 450 (+250 pharmacy outlets)
- APLS: 650 pharmacies (approx. 26 % market share)
- Pharmacy professionals: 4 000

Slovakia:

- Number of public pharmacies: approx. 2 150
- APSL: 418 pharmacies (approx. 20 % market share)
- Pharmacy professionals: 2 200

Hungary:

- Number of public pharmacies: approx. 2 400
- HGYSZ: 248 pharmacies (approx. 10 % market share)
- Pharmacy professionals: 1 300

Romania:

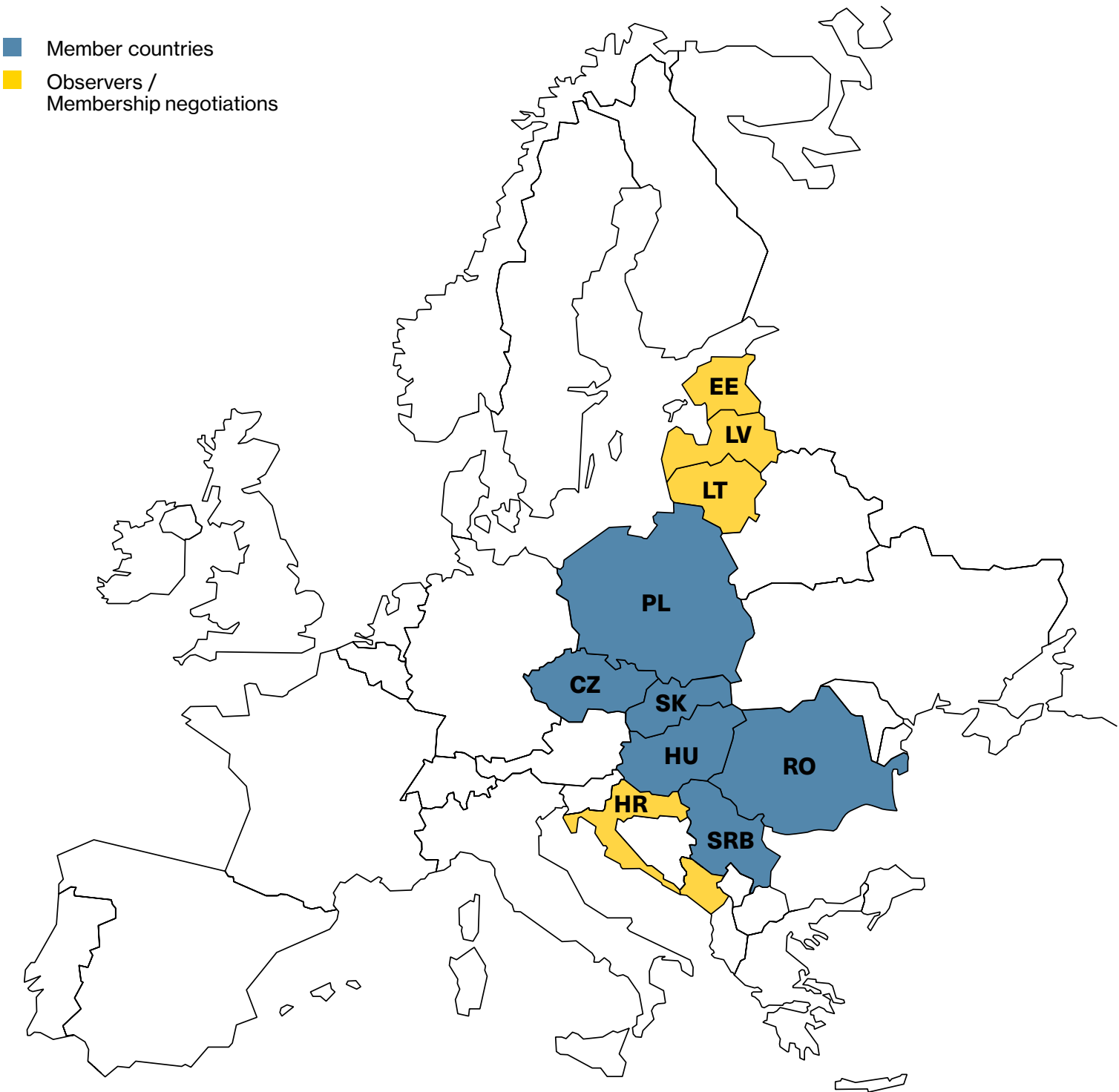
- Number of public pharmacies: approx. 9 360
- ADRFR: 1 251 pharmacies (approx. 13 % market share)
- Pharmacy professionals: 6 204

Poland: (since October 2020)

- Number of public pharmacies: approx. 9 360
- ADRFR: 1 251 pharmacies (approx. 13 % market share)
- Pharmacy professionals: 6 204

Serbia: (since July 2021)

- Number of public pharmacies: approx. 3 927
- PharmaNET: 646 pharmacies (approx. 20 % market share)
- Pharmacy professionals: 2 800



Highlights of the Year

- 10 March 2021
2nd EFPC Conference
“Pharmacy Care – Beyond the Pandemic”
- 23 March 2021 Poland – infringements of EU law
- 7—9 September 2021
Economic and Healthcare Forum in Karpacz,
Poland
- 21 September 2020
APAvision podcast session “Pharmaceutical
care in Europe face to face the Pandemic”



2nd EFPC Conference “Pharmacy Care — Beyond the Pandemic”

(was rescheduled from 2020 to 2021 due to covid-19 restrictions)

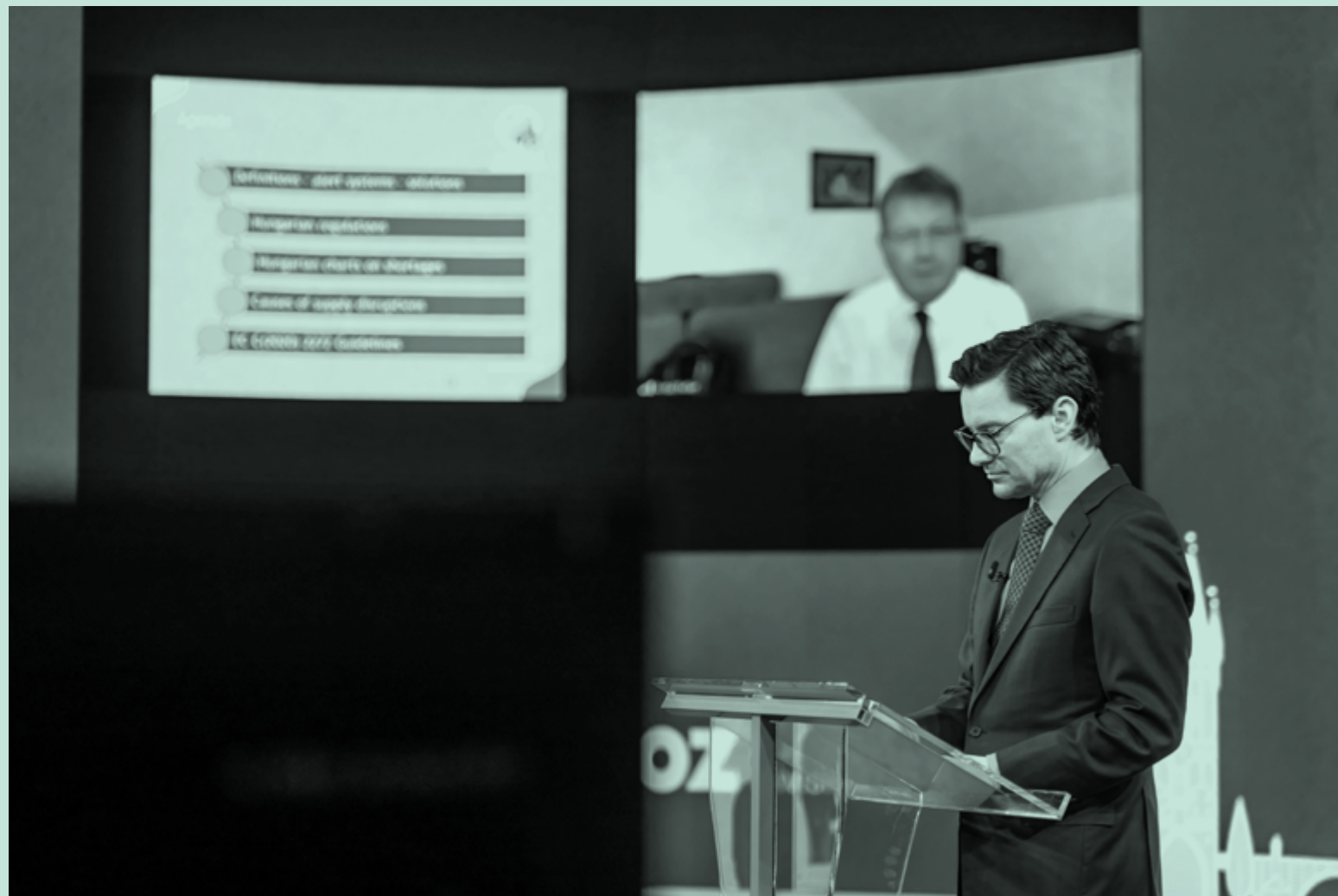
INNOVATIONS IN PHARMACY HELP IN FIRST YEAR OF COVID-19 PANDEMIC

European pharmacists have been an unquestionable part of the medical frontline during the coronavirus crisis. This was highlighted by every participant of an international conference organised by the European Federation of Pharmaceutical Chains (EFPC). They agreed that the deployment of health professionals, the willingness to take innovative approaches and the ability to implement rapid change were all key to working in exceptional circumstances.

Bucharest / Prague, 10 March 2021 – The PHARMACY CARE – BEYOND THE PANDEMIC conference organised by the EFPC, unlike its last conference in 2019, took place virtually, via video links and two studios as a result of coronavirus crisis restrictions. Abroadcast centre was set up in Bucharest, the capital city of Romania. Prague was chosen as the second centre. In total, 360 participants registered for the conference.

In his introductory speech, Daniel Horák, Head of EFPC executive board and head of the Czech Association of Pharmacy Chain Operators, highlighted the fundamental changes undergone in pharmacy in the first year of the pandemic. While brick-and-mortar pharmacies recorded a year-on-year decline, online pharmacies demonstrated clear successes and confirmed the legitimacy of certain innovative trends. First, however, the safety of staff in both pharmacies and logistics had to be ensured, even in situations where the global market was experiencing a lack of protective equipment. Thanks to this, pharmacies could provide almost uninterrupted services, even when some surgeries were closed. Therefore, they represented the most accessible routine medical care.





Innovations that helped them cope fundamentally with the changed situation were the electronic prescription and the medication reservation system. It has also become evident that real needs can push the boundaries of applicable legislation – this applies with home deliveries of prescribed medicines, which Czech law does not permit in normal circumstances, but has been tolerated throughout the COVID crisis. The next speaker, Sebastian Ring, member of EFPC executive board, confirmed that pharmacists all over Europe had played an essential role in frontline healthcare, followed by Alexandru Rafila, a Deputy Speaker of the Romanian Chamber of Deputies and World Health Organization (WHO) Executive Board Member, who addressed the subject of asufficiently robust healthcare system.

The pharmaceutical market has experienced serious shortages during the pandemic, which was reflected in the temporary unavailability of certain products and protective equipment. The next speaker, Nathalie Moll, Director General of the European Federation of Pharmaceutical Industries and Associations (EFPIA), mapped out the bottlenecks behind the shortages of medications and noted that there was still alack of consensus within the EU about how to prevent them. Feller Antal, Head of the executive board of the Hungarian Association of Pharmaceutical Wholesalers, first compared the different definitions of drug shortages across the European Countries. Then he analyzed the many causes of shortages, provided data on the Hungarian situation and finally spoke about the new European guidelines regarding drug shortages.



Former Dean of the Faculty of Pharmacy at Bratislava's Comenius University, Ján Kyselovič, went on to declare that alongside temporary shortage issues, the lack of qualified staff was along-standing issue in pharmacy, which proved to be particularly pronounced during the pandemic. In his opinion, the current critical situation has recorded a shift of the regulatory barriers in healthcare, since pandemic reality has demonstrated the limited practicality of the existing regulations in exceptional circumstances. In his view, this has significantly restricted the launch of new services in pharmacies. In this context, there has been much talk recently about vaccination by pharmacists. The former head of the Czech State Institute for Drug Control and EFPC Executive Director,

Zdeněk Blahuta, also spoke of this, comparing, for instance, the degree of willingness to be vaccinated between healthcare professionals and the general public. He highlighted that it was only slightly higher amongst medical professionals. The former Czech Minister of Health, Roman Prymula, provided a comprehensive overview of the current vaccination options against COVID-19. Secretary of the Health Committee at the Romanian Senate, Mr Attila enforced the idea of implementing the pharmaceutical services in pharmacies and, also the pharmacist role as a health professional during the pandemic.

Marcin Tomasik, legal expert of the Polish Association of Pharmaceutical Employers, pointed out that Europe is not a legislative monolith in terms of the organization of pharmacy markets, the number and rules of pharmacy operation. European legislation in this respect is very diverse and historically and culturally conditioned. So there is no clear pattern of development for the pharmacy market. Some countries like Great Britain, Ireland, the Netherlands, Switzerland, Norway, Sweden etc. are examples of liberal markets, with a tendency to open them up to improve the availability of drugs and pharmacy services. In others, such as in Spain, Austria or France, a high level of state interference in the market persists. However, even where the pharmacy market is strictly regulated, usually two types of restrictions are most common, with numerous exceptions. Meanwhile, in four Central and Eastern European countries: Poland, Hungary, Latvia and Estonia, as many as four types of restrictions have been introduced in the last decade. Additionally, Poland introduced a total ban on advertising activities of a pharmacy – a phenomenon against both the CEE and the EU background.

The EFPC plans to hold its next conference in 2022 in Warsaw.

The General Partner of the conference



Poland – infringements of EU law

In 2021, the EFPC expressed support for the complaint lodged with the European Commission relating to the Polish legislation on pharmacies.

The complaint regarded illegal and retroactive application of law by the Polish Main Pharmaceutical Inspection, which resulted in an impediment in activity of pharmacy chains in Poland.

As a result of the unlawful interpretation of Polish Pharmaceutical Law Act, the Inspection revokes permits to run pharmacy, declare their expiry or refuses to amend them, thus effectively precluding the operation of many pharmacies. These practices are predominantly based on two regulations: the 1% rule and rules of so called “Pharmacy for Pharmacist” Act, which bans issuing new permits to non-pharmacists (or partnerships thereof) and pharmacists (or partnerships thereof) who already run 4 or more pharmacies nationwide (the limit includes their capital group).

1% rule provides that a permit to run a pharmacy shall not be issued to entities which own (directly or indirectly) more than 1 % of pharmacies in a given province. Despite clear wording of this rule and many years of its consistent application in proceedings regarding issuing new permits only, in 2015 the Inspection started to apply these provisions for the purposes of revoking or refusing to amend existing permits. The Inspection continues to do so, in spite of several judgments of the Supreme Administrative Court confirming that 1% rule applies to issuing of new permits only.

Rules of “Pharmacy for Pharmacist” Act are similarly misinterpreted. The Inspection disregards rules which introduced these new provisions and extends the application of these provisions beyond their clear wording and legislative intent. The new law was aimed at prohibiting issuing new permits to non-pharmacists and entities who run 4 or more pharmacies,

but pre-amendment pharmacy companies were to remain intact. The Inspection however, uses new regulations to close numerous pharmacies belonging to chains, in spite of chains having permits dating back to pre-amendment times. Were the regulations properly applied, pharmacy chains, though prohibited from expanding, would have a chance to remain viable at the market. Currently however, their existing business are severely threatened by lack of predictability of law application.

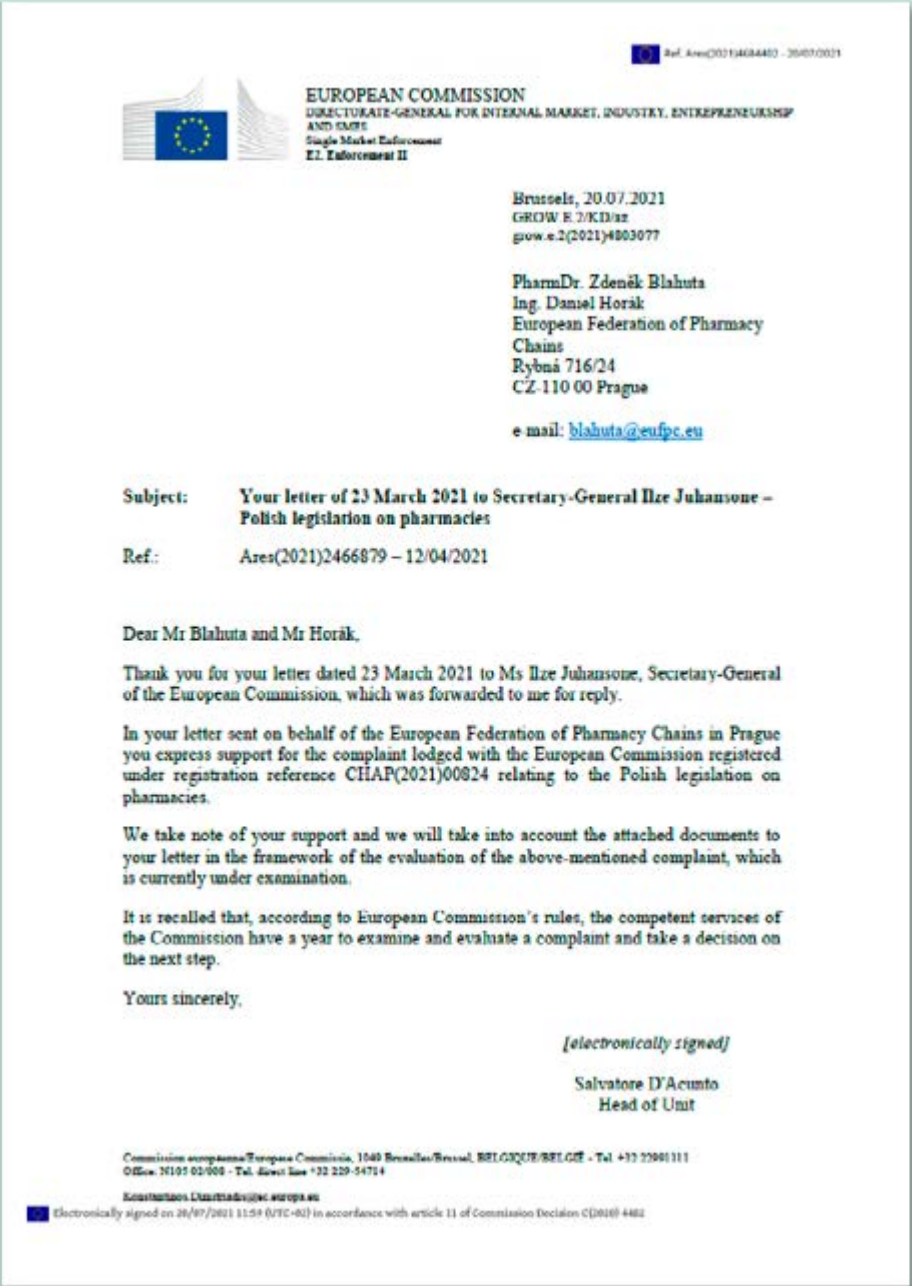
We are also deeply concerned about the involvement of Polish Pharmaceutical Chamber which supports Inspection's actions, lobbies in favour of the retroactive law-application and often moves to initiate administrative proceedings which are supposed to result in revocation of chains' permits (moreover, formal agreements entered into with the Inspection, gives the Chambers access to these administrative proceedings). The Chamber openly declares that its aim is to eliminate foreign pharmacy chains from the Polish market. It is worth noting, that the Chamber was practically co-author of the “Pharmacy for Pharmacist” Act and the rationale for this project was to restrict activities and development of pharmacy chains in Poland (especially pharmacy chains with foreign capital). The Chamber's influence on Polish authorities is especially egregious, taking into account that the Chamber is comprised of pharmacists who often run pharmacies themselves and who are thus competitors for pharmacy chains. It practically means that association of entrepreneurs influence legislators to pass law prohibiting their competitors from expanding, later it influences law enforcement to abuse this law and restrict these competitors even more.

The EFPC members believe that the actions of Main Pharmaceutical Inspection constitute a serious threat to pharmacy chains' market access and are discouraging for local as well as entrepreneurs from other EU

member states to expand their businesses in Poland. They also violate fundamental rules of common market and pose a serious barrier for patients' access to pharmaceutical healthcare. Due to a lengthy judicial procedure many pharmacies may remain closed and losses incurred by the companies might be irreversible.

The EFPC members are of the opinion that these measures infringe European rules of common market, in particular the freedom of establishment and the free flow of capital.

The whole matter was discussed in the Executive Board of the EFPC and with one mind agreed on all assistance in the case of Poland and sending the EFPC letter to Secretary-General of the European Commission.



Economic Forum in Karpacz, Poland

Running Generally Accessible Pharmacies in Poland Against the Background of EU Countries – Challenges, Prospects for Changes.

Zdeněk Blahuta, Executive Director of the EFPC, attended a prestigious Economic and Health Forum in Karpacz in September 2021. He introduced different attitudes to pharmacy care and pharmacy ownership and made a comparison with the liberalized markets in Europe.

Participants of the panel: Ewa Krajewska, the recently appointed Chief Pharmaceutical Main Inspector, Mariusz Jablonski, Academic Teacher, Jacek Cieplak, Deputy Ombudsman for Small and Medium Enterprises, and Zdeněk Blahuta, Executive Director of the EFPC.

The EFPC was a great success and an opportunity to present at a prestigious international conference.



The 10th session held in the framework of the APAvision project, a think tank for exchanging opinions and experiences pertaining to pharmacy, electronic healthcare, and innovation in the dispensation of pharmaceuticals, was titled Barriers in the Development of the Pharmacy Sector. Organized by Dr. Martin Dočkal, an expert on pharmacy and the pharmaceutical management, the event was intended not only for pharmacists and pharmacy operators, but also for the main players in such areas as the pharmaceutical industry, innovation, e-health, start-ups, and digitization in the pharmacy sector.

The session took place in Hotel Eurostars Thalia in Prague on 21 September 2021.

The guests included Daniel Horák (Chairman of the Board of Directors of the European Federation of Pharmacy Chains, CEO at Česká Lékárna Holding / Viapharma), Catalina Pinteá (Regulatory Affairs Manager at Help Net Pharma), Marija Golubović Marković (Pharmacist, Head of Professional Development at Dr. Max Serbia), and Marcin Tomasik (Partner at TJSP Law Firm and Legal Expert of the Polish Association of Pharmaceutical Employers PharmaNET).

At the beginning of the session, Dr. Dočkal invited Horák to review the past progress and impact of the pandemic on pharmacies across EFPC member countries and to identify services with a potential to drive the development of innovations in the pharmacy sector.

Horák mentioned the importance of electronic prescription, a key factor in a pandemic time. Despite the fact that it had taken years to put into practice, physicians as well as some of the pharmacists who were formerly rejecting it in the end welcomed being able to resort to this option.

Horák also pointed out the important role pharmacies played at the beginning of the pandemic, when pharmacists provided patients and, in many cases, physicians with information of the correct and effective use of medicines.

In fact, pharmacies were the only health facilities that remained fully available throughout the pandemic. Unlike doctors who closed their offices, particularly during the first wave, and treated patients over the telephone, without personal visits.

“The pandemic significantly increased the use of e-prescription. Even doctors who were formerly refusing it began using it. Because it is a very convenient and, in many cases, the only available method of communicating with a physician and subsequently having a prescription issued by electronic means,” explained Horák.

The first step was followed by activities at a higher level – the reservation of prescribed medicinal products. Many patients were afraid of visiting a pharmacy, and many were quarantined. In response, pharmacies launched this new service for a limited number of patients, mainly aged persons.

The third service introduced during the pandemic was home delivery of prescription pharmaceuticals. For example, the Czech branch of Dr. Max tested it based on recommendations made by local authorities. According to Horák, however, demand for this service was low, most likely because it was presented and recommended for patients aged 65 years and older.

“To sum things up, e-prescription was a great victory, reservations were, and continue to be, used to a significant extent, but home delivery is questionable. Perhaps it's because we have not been able to offer this service in a standard manner, the way it is commonplace in many other countries,” Horák added.

Dr. Dočkal subsequently asked whether some of the services whose introduction was instigated by the pandemic would remain to be offered in the future.

According to Horák, reserving prescription and over-the-counter medicinal products has now become a standard service sought by an increasing number of patients. This comes as no surprise because the reservation service allows customers to visit a pharmacy only once to collect all of their medications.

As regards home delivery, Horák believes that the pandemic has opened a discussion about this topic, and revealed the real demand for this service, if demand exists at all, in light of the target groups of patients.

His experience shows that the potential of this service is limited, as it mostly appeals to individuals who are quarantined or whose access to pharmacies is restricted in another way.

In addition, the service tends to be preferred by young consumers in large cities, as older patients (60+) continue preferring a visit to a pharmacy, even if they take advantage of the reservation option.

In response to Horák's findings, Dr. Dočkal inquired about his view of the general factors that hinder the introduction and implementation of new services and innovations in the pharmacy sector in regard to legislation, their acceptance by pharmacy staff, demand on the part of consumers, and other aspects.

"Patients have dramatically changed the way they think. The use of IT technologies has become routine in many areas, and the pharmacy sector is no exception. The issue at stake is not whether the relevant legislation will come sooner or later, but what demand on the part of patients will be," opines Horák.

He mainly expects an increase in demand in regard to reservations. In addition, some consumers might take advantage of home delivery because they are familiar with this service from other countries.

"On other hand, I believe that people's perception of pharmacies will change significantly. During the lockdown, pharmacies remained the only accessible point where health services could be obtained, which was not

the case with standard medical establishments. Consequently, I expect a discussion about whether certain services should be provided in pharmacies," added Horák.

According to him, a country like the Czech Republic, which has a very liberal pharmacy sector market, does not allow providing any specialized services despite the fact that such services are commonplace elsewhere in Europe, including vaccination, various forms of testing, and others.

Horák therefore opines that the current situation will provide an impetus for changing attitudes harboured by Czech authorities because there is demand among patients and because services provided during the pandemic substantially improved the favourable perception of pharmacies on the part of the public.

"I trust that such services as vaccination in pharmacies, not only against COVID-19, could be permitted within the next 12 – 18 months."

Dr. Dočkal asked about e-prescription another guest who participated in the previous online session, Catalina Pinteá from the Romanian Division of Benu Pharmacies. According to Pinteá, Romania has made a large leap forward in introducing pharmacy services, and Romanian pharmacies are in the centre of attention thanks to their easy accessibility, as is the case of other countries.

Like elsewhere, digitization is the main topic in Romania, as implementing digital solutions is necessary in view of experience gained during the current pandemic.

In Romania, pressures are being exerted by the main players to ease the rules for the online dispensation of prescription medications, particularly for chronic patients and some other patient groups. A debate to that effect is currently under way.

The home delivery service is already available in Romania for OTC medications. In light of the current developments, a debate is in progress regarding allowing the dispensation of prescription drugs to chronic

patients suffering from such diseases as cancer, diabetes, and others. According to Pinteá, if permitted, these services will be provided exclusively by pharmacists.

Despite mentioning during the previous APAvision session that preparations for vaccination in pharmacies were under way, Pinteá reported that this service has not been permitted in the wake of political changes.

“Nevertheless, there has been a breakthrough in regard to various testing services in pharmacies. As a result, pharmacies can now administer COVID-19 tests. Discussions about vaccination are now fully underway. One of the issues considered is flu vaccination in pharmacies,” Pinteá added.

Dr. Dočkal continually monitors worldwide trends in pharmacy and the pharmacy sector to have access to the latest information for providing his expert consulting services. His recent discussion with a Serbian pharmacist has served as a basis for compiling a detailed overview of the new definition of pharmacy services in her country.

Marija Golubović Marković was surprised by Dočkal’s extensive knowledge and confirmed that his information on developments in Serbia is correct. She subsequently reported on recent developments in the pharmacy sector in her country and their ramifications.

Dr. Dočkal pointed out an important factor that plays a major role in implementing pharmacy innovations in Serbia, specifically remuneration. Thanks to his extensive knowledge of global developments in the pharmacy sector, he mentioned that the conditions in that regard have somewhat improved, which Marija Golubović Marković confirmed:

“About six or seven years ago, there was a large exodus of Serbian professionals to other countries, Scandinavia in particular. It affected the pharmacy sector as well as other areas of healthcare. I had to communicate with the destination countries regarding this problem because as many as 30 people would leave our chain at the same time.

The main issue was wages and salaries. We used to have one university pharmacy program, but then three or four additional ones opened. All of a sudden, there were more specialists on the labour market, which logically reduced demand and remuneration.”

Another reason Golubović Marković mentioned is the pharmacy curriculum, which does not correspond to current real-world requirements.

Remuneration paid under the table is another issue affecting the pharmacy sector in Serbia. In particular, pharmacies other than the large chains pay salaries on the side, a phenomenon that is difficult to prove, even if suspected. Golubović Marković said that efforts are being made to tackle this serious problem, but progress has been rather slow.

In Poland, the issue du jour are inspections. Accordingly, Dr. Dočkal invited to the present session a representative from the largest Polish association of pharmacy sector employers.

Dočkal has posted a vast quantity of detailed information about Polish pharmacy sector legislation on APATYKÁŘ®, courtesy of which more and more users subscribe to content distributed through the portal. This APAvision session provided an ideal opportunity for reviewing Polish experience of the past several years.

Marcin Tomasik pointed out two overlapping aspects of the Polish law, and presented a lawyer’s viewpoint of the new legislation:

“Poland currently has the most regulated market in Europe. It’s akin to Molotov cocktail. You mix various ingredients, all restrictions known throughout Europe, and then you make them into a law. The result are regulations that must be followed by pharmacies and pharmacists.”

Numerous court rulings have been delivered regarding the new legislation and its implementation. An exhaustive overview is available on the APATYKÁŘ® portal. Thanks to his long-term focus on Polish pharmacy sector laws, Dr. Dočkal is able to provide consultations regarding issues that exist in Poland.



In this regard, he mentioned new developments, specifically the fact that Polish pharmacies have started offering vaccination against COVID-19. Paradoxically, the legislation prevents the service from being promoted in an effective manner because the Polish law prohibits advertising for pharmacy services, save for certain very strict exceptions, such as information on the address and opening hours.

However, Tomasik said that the new director of the Chief Pharmaceutical Inspectorate has hinted at a change in the judicial practice to allow the law to function to the benefit of patients and to eliminate unnecessary burden placed on pharmacy businesses.

In the next part of the session, Dr. Dočkal focused on new approaches practiced in the pharmacy sector in Serbia. Specifically, he pointed out that the Serbian Division of Dr. Max had followed in the footsteps of its Czech counterpart and opened a large galenic laboratory in Belgrade. As a pharmacist, Dočkal inquired about interest on the part of pharmacists and pharmacy assistants in working in the laboratory.

In answering, Golubović Marković described the extemporaneous preparation of medicines in her country and the reasons why the laboratory is so important for the pharmacy sector.

Her explanation exposed the highly ambitious nature of the plans. Consequently, Dočkal continued examining this topic and invited Daniel Horák to participate. The latter presented the current state of centralized preparation in the Czech Republic, where the Dr. Max chain is the undisputed leader thanks to its three laboratories in Prague, Brno, and Ostrava.

“We have one the most specialized, best equipped, and cleanest laboratory in Prague and additional laboratories for routine preparatory tasks in other cities. The largest facility was opened seven years ago. It has now been upgraded, while another new laboratory is about to open. Future plans will be made depending on market demand. Personally, I hope that not all of our pharmacies will be the same in the future, that each of them will specialize

in different products and services. Some will focus on preparing medicines, others on vaccination, and so on. For that, however, the legislation needs to be amended,” Horák added.

In this context, he once again mentioned the growing role of pharmacies in connection with such unnecessary efforts as the opening of vaccination centres in shopping malls in view of the fact that all such facilities feature a pharmacy capable of delivering vaccination in much more suitable conditions.

Another pressing issue is a shortage of educated pharmacy staff in pharmacies. This problem exists in all countries, perhaps with the exception of Poland. The reasons vary.

One of them is a lack of universities offering pharmacy programs, which prevents obtaining relevant education, earning appropriate income, and being perceived as an expert in the field. All of that is underscored by Catalina Pinteá:

“Today, pharmacists are unfortunately regarded as medicine salespersons. Their role is not recognized and appreciated. That is why interest has declined among young people to study pharmacy. Pharmacies are facing a shortage of medical personnel. That results in reducing opening hours, understaffing, and restricted access of patients to high-quality pharmacy services.”

Pinteá also explained that the academic curriculum is outdated and inappropriate for today’s needs, such as specialization requirements in certain fields. She confirmed that in response to demands made by the main players, discussions with universities had begun regarding changes, including specialized medical education.

In addition, pharmacy operators in all countries organize events promoting their profession and its perception as well as events motivating young people to study pharmacy.

The specifics of the Polish market were presented by Marcin Tomasik. Paradoxically, Poland is on the one hand introducing revolutionary services, but on the other hand, legislation prevents young pharmacists, many of whom wish to embark on a professional career, from entering the labour market.

Likewise, geographic and demographic restrictions do not allow young pharmacists to find a position in larger cities, where the market is saturated by senior pharmacists and pharmacy owners.

Golubović Marković presented another viewpoint. According to her, pharmacists face the problem of not sufficiently demonstrating pride in their profession:

“I believe that the attitudes of pharmacists in pharmacies needs to change. Professional associations can do only a part of the job. I’m told that pharmacists perceive themselves as salespersons, and pharmacies are regarded as stores selling medicines. This is how they see themselves, not how they’re perceived by patients. If this is the reality, not much can be changed.”

Dr. Dočkal spoke about pharmacists’ attitudes toward their education as well as motivation for running their own pharmacy. Perception among the young generation is essentially the same as in the Czech Republic. Despite frequent claims to the contrary made by some lobbying groups, young pharmacists simply do not want to run their own pharmacy due to a lack of willingness to assume responsibility.

In this regard, Daniel Horák pointed out not only the shortage of pharmacists, the issue predominantly debated thus far, but also, and more importantly, an insufficient number of pharmacy assistants. This problem became more exacerbated during the pandemic. Despite offering full employment, the pharmacy sector remains relatively unattractive to the young generation.

Another challenge is the prevalence of female professionals in the pharmacy field, which results in workforce fluctuations lasting three to six

years. In view of these considerations, the Dr. Max chain has implemented a different model for organization of work processes, which Horák presented.

At first glance, the situation in Poland might appear as optimal for pharmacists. Nonetheless, Tomasik explained that things are much more complicated. Owing to recently adopted legislation, Poland could soon be facing a lack of interest in working in the pharmacy sector as well.

An increase in efforts to promote pharmacy as a profession is necessary. This sentiment was echoed in the concluding remarks of all of the participants in the 10th session of Dr. Dočkal’s APAvision expert platform.

Pharmacy is a fascinating field, but interest in becoming a pharmacist has now for some time been declining. It is commendable that the main players in individual countries are working hard with a view to reversing the current unfavourable trend.

APAvision® (www.apavision.cz) is an expert platform created by Dr. Martin Dočkal to facilitate the exchange of opinions and experiences in such fields as pharmacy, pharmaceuticals, e-health, and innovation in the pharmacy sector. Dr. Martin Dočkal is an expert on pharmacy and pharmaceutical management with more than 25 years of experience in the field. He runs the APATYKÁŘ® portal that provides online pharmacy consulting. Dr. Dočkal specializes in pharmacy innovations, start-ups, online pharmacy services, e-health solutions, medicine policies, innovative pharmacy services and their financing, supplementary pharmacy services, logistics, pharmacy distribution chains, and podcasting.

Dr. Martin Dočkal, an expert on pharmacy and pharmaceutical management. www.apatykar.info



Moderator: Martin Dočkal (Czech Republic)



Marija Golubović Marković (Serbia)



Daniel Horák (Czech Republic)



Catalina Pinte (Romania)



Marcin Tomasik (Poland)

EFPC Regular Sessions

- 14 January 2021
Executive Committee Meeting — online
- 23 March 2021
Executive Committee Meeting — online
- 11 May 2021
Executive Committee Meeting — online
- 23 June 2021
Members' Meeting — online
- 21 September 2021
Executive Committee Meeting in Prague
- 8 December 2021
Members' Meeting — online

14 January 2021

Executive Committee Meeting – online

The main issues of the first meeting of the new year were COVID-19 and the prospect of vaccination in pharmacies. Given that Zdeněk Blahuta, Executive Director of the EFPC, was recently appointed the national coordinator of vaccination against COVID-19 in the Czech Republic, the discussion was really rich and comprehensive.

The second issue of the meeting was the upcoming Annual Conference and its organization. The members of the Executive Committee decided to organize the conference from Bucharest and Prague simultaneously. The budget of the conference was therefore changed to reflect the increase of the expenses for two studios, moderators, etc.

The new membership strategy was also discussed.

23 March 2021

Executive Committee Meeting – Online

The Annual Conference was evaluated, and it was determined that the 3rd Annual Conference in 2022 will be held in Warsaw, Poland.

During the Executive Committee Meeting, the infringements of EU law strategy were discussed, and the letter to the Secretary-General of the European Commission was approved. Zdeněk Blahuta, Executive Director, was appointed by the members of the Board to manage matters.

New activities and the membership strategy for 2021/2022 were introduced.

At the end of the meeting, a discussion about the Rx online amendment in the Czech Parliament was conducted. It introduced networking an anti-Rx online campaign in some Czech pharmacies. Romanian representatives introduced a new survey about pharmaceutical services in Romania.

The members of the Executive Committee were asked to organize APAvision in September 2021.

11 May 2021

Executive Committee Meeting – Online

Due to the current COVID-19 situation in Europe and around the world, the Board decided to keep the May meeting online as well.

Marcin Tomasik, an attorney interested in European law, joined the meeting. Marcin Tomasik introduced the infringements of EU law issue to participants and all Polish market regulation aspects to Executive Committee members.

23 June 2021

Members' Meeting – Online

The June meeting had two parts: the Membership meeting and the Executive Committee meeting.

Executive Director Zdeněk Blahuta informed all participants that the Association of Private Pharmacy Chains Belgrade applied for membership in the EFPC and introduced a representative of the Serbian association, Marija Marković Golubović.

Members approved the application of the Serbian association to become a regular member of the EFPC.

The 2020 Profit and Loss Statement was approved during the Membership meeting.

The date of the 3rd Annual Conference of the EFPC was discussed. All the members approved that the conference would be held on 10 March 2022 in Warsaw.

A new project of the European Academy of Chain Pharmacists was introduced to all members of the Board of Directors. The main goal of the project is to create a voice for European pharmacists (employees) and to increase their knowledge of regulation and its impact on individual countries. The exchange program should acquaint all participants with current issues and show the differences of the European market and different approaches to pharmacy care.

The project should be launched in June 2022, and its first host country should be the Czech Republic.

21 September 2021

Executive Committee Meeting in Prague

Zdeněk Blahuta, Executive Director, informed attendees that he had received a formal reply from the European Commission office regarding the infringements of EU law. The head of the unit informed him that EFPC support would be taken into account. The evidence included the attached documents to the letter in evaluating the mentioned complaint, which is currently under examination.

According to the European Commission's rules, the Commission has one year to examine and evaluate a complaint and to decide on the next step. Zdeněk Blahuta assured attendees that he would monitor the situation.

As a last point, Zdeněk Blahuta informed attendees about the Economic and Health Forum in Karpacz (Poland) and thanked Polish colleagues for the invitation, as well as their perfect coordination and media support.

Zdeněk Blahuta presented the membership situation in the Baltic countries. Due to changes in the company's Board, the term of the personal meeting was delayed.

Daniel Horák, Chairman of the Board, informed attendees that he was in contact with representatives of a Croatian pharmacy chain. The representatives had been interested in attending the EFPC meeting. Unfortunately, they had to cancel due to work commitments. He informed

attendees that there is a high probability that their pharmacy chain will join the Federation as an observer in the following months.

Josef Vaniček, a Czech representative, reminded attendees that representatives of McKesson Europe were interested in all EFPC activities, but they couldn't join the Federation this year.

Catalina Pinte, a Romanian representative, informed attendees about the new pharmacy service related to COVID-19 that was launched in Romania.

The Apavision session followed the meeting.

8 December 2021

Members' Meeting – Online

The last meeting of the year started with a COVID-19 update. All representatives were informed about the number of vaccinated people, mortality rates, and restrictions related to COVID-19 in their country.

The main issue of the meeting was the upcoming Annual Conference, budget, speakers and venue. The organizational team informed the EFPC members about the status, suggested the topic of panels, and informed them about sponsorship progress.

The priorities for 2022 were discussed.

Karolina Korodi, a Hungarian representative, informed attendees about new legal changes in pharmacy services in Hungary. As the main threat, she mentioned the upcoming prohibition of web shops for pharmacies and rising pressure against franchising. She informed attendees that the amendment is waiting for the Hungarian president's signature. Based on her information, the president would send the amendment back. Karolina Korodi is going to prepare a new text and start communicating with the pharmacy chamber. She will inform attendees about the situation at the next meeting. Karolina Korodi also mentioned that there had been discussion about vaccinations in pharmacies next year in Hungary.

Executive Director Letter

Executive Director Letter

Dear friends,

When we were preparing the EFPC's 2020 Annual Report last year, we were convinced that the major restrictions associated with the spread of the COVID-19 pandemic were well behind us and could not get any worse. Currently, I have to say that we could not have been more wrong at the time. One of the many proofs of our error was the number of meetings via videoconferencing. Another was that the proceedings of the 2nd EFPC Expert Conference were held entirely online from two studios in Bucharest and Prague. I firmly believe, however, that in these difficult times of long-term pandemic restrictions, the EFPC has stood its ground.

In the Annual Report, you can see a varied list of events. I would like to acknowledge the input of the Serbian National Association of Private Pharmacy Chains, their active participation in the Karpacz Conference, and in other events.

Personally, I appreciate most what you will not find in the list of our events and activities. It is the team spirit and the constructive atmosphere and attitude of all members and representatives of the national associations.

I am sure this is a major factor that has enabled the EFPC to fulfill its vision and mission in such difficult circumstances.

If I should comment on the agenda for the coming period, I would like to stress that we will again focus on the enlargement of the Federation through negotiations in the Baltics and the Balkans as the restrictions are gradually eased, in order to successfully complete the negotiations we have started. Not everything can be dealt with effectively online.

Finally, I would like to thank all members and colleagues for their great work and constructive approach, and I look forward to working with them in 2022, the fifth year of the EFPC.

Zdeněk Blahuta

Executive Director, EFPC



Zdeněk Blahuta, Executive Director, EFPC

About

The European Federation of Pharmacy Chains (EFPC) was established on October 10, 2018, with operation to launch in January 2019 in Prague. The EFPC brought together Pharmacy chain associations from the Czech Republic (APLS CZ), Slovakia (APLS SK) and Hungary (HGYSZ).

The EFPC is the only organization representing pharmacy chains in Europe. The EFPC is an independent, voluntary, non-political and non-governmental organization, which cooperates and encourages strong links between the European organizations in order to solve issues of pharmacy sector.

It represents over 34 500 pharmacy experts, 6 200 pharmacies and 6 European countries.

An important part of the EFPC activities is support and protection of the interest of its members, conduct and report of surveys work related issues. Furthermore, the Federation provides educational activities in the pharmaceutical field and advocacy service for the members. The EFPC was developed from a response to negative trends in some Central and Eastern European countries which are in conflict of patient interests.

The EFPC is reliable partner for national and European regulatory authorities, stakeholder and beyond and support an open and constructive discussion in the pharmaceutical sector.

Vision:

The EFPC members believe that liberalization of the pharmacy market is the best way to improve patient comfort and it leads to high consumer satisfaction with the functioning of the pharmacy market. The EFPC sees of patients' changing shopping behavior in other fields and aware that there is a high probability that these changes will arise within a short time in pharmaceutical sector as well. By that time, an implementation of some processes should be led by legislators to meet patients' needs and ensure the safe servicing and keep right practice expedition.

Mission:

The mission of the EFPC is defend liberal market and the interest of patients, pharmacy workers and owners in Europe. The EFPC creates optimum conditions for the development of the pharmacy business and the activities of pharmacy operators in EU members states, and the provision of services related to the performance of their activities and established against any violation of the fundamental right to their properties / shareholding rights. The EFPC wants to bring attention to actions that go against activities include promoting the concept of "Pharmacy for the Pharmacists", which is unheard of in any other field.

The EFPC represents and protects economic, business and social interests of its members in pharmacy business.

Aims and Objectives of the EFPC:

- Defend the interests of patients and pharmacy workers and owners
- Monitoring activities which could have tendency to limit patient rights, worsening accessibility, reducing the effectiveness of pharmacy care in our members countries
- Protecting economic, business and social interests of the EFPC members
- Creation of optimum conditions for the development of the pharmacy business
- Closest cooperation with members of national associations
- Coordinated PA and PR activities

Upcoming Events 2021

EFPC members are aware of the continuing coronavirus pandemic, even in 2022. Based on experience from 2021, however, they intend to continue all the activities that they started in previous years. Simultaneously, they will provide all communications for online meetings, particularly the 3rd Annual EFPC Conference, which will be held in Warsaw in March 2022.

Due to the success of Zdeněk Blahuta, Executive Director, during the international conference on the Economic and Health Forum in Karpacz, Poland and the interest of the audience in pharmacy issues, we are going to attend and participate in other national and the international conferences in Europe in 2022. We strongly believe that we will be able to participate in the Economic and Health Forum in Karpacz in 2022 and in the international pharmaceutical conference in Serbia as well.

Great importance will be placed on membership. Our priority will be to increase the number of members, and we will focus on promoting the EFPC in 2022 at the international level. Contact with the Baltic countries and their representatives will be re-established, and new contact links will be established with new potential members.

The EFPC will launch a new exchange program focused on employees and pharmacists working for pharmacy chains. The project aims to strengthen contacts and communication and to improve knowledge of the laws and regulations and their impact in individual countries. The exchange program should acquaint all participants with current issues and show the differences within the European market and the different approaches to pharmacy care. The organizing country will be the Czech Republic.

The EFPC members plan to continue organizing roundtable discussions and academic conferences to promote and popularize pharmacy care issues in Europe.

One of the EFPC's goals for 2022 is to provide all of the support to the Polish member association in the infringements of EU law issue and assist the Hungarian association in dealing with the amendment of the prohibition of web shops for pharmacies and to reduce the risk of pressure to cancel the franchise in Hungary.

The EFPC Executive Team

The EFPC Executive Director



Zdeněk Blahuta, Czech Republic

He has more than 30 years of experience with management of public pharmacies, hospital pharmacies and pharmaceutical wholesalers. He is former Head of the State Institute for Drug Control in the Czech Republic (SUKL) and he was Member of Board of the European Medicines Agency (EMA) and former Covid-19 vaccination strategy coordinator in the Czech Republic.

The EFPC Executive board



Daniel Horák
Head of Executive Board



Karolina Korodi
Member of Executive Board



Sina Niku
Member of Executive Board



Sebastian Ring
Member of Executive Board



Marcin Piskorski
Member of Executive Board

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