
Roche and Genentech Company Presentation
*Alex Szidon, Head of Business Development Genentech
Research & Early Development, Pharma Partnering*
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**The Roche Group: an
innovation-led company**



**Why we make a
good partner**



**What we are looking
for from you**

The Roche Group

A leading healthcare company dedicated to innovation in a sustainable way

1896

Founded in Basel
Family still holds
majority stake



61.5 bn

Sales 2019 (CHF)



Genentech¹, first
publicly-owned

Biotech



#1

R&D investor in
healthcare

97'735

Employees worldwide

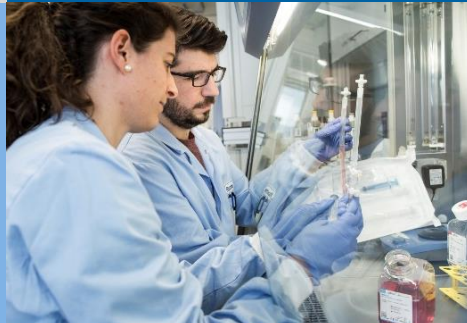
63,000,000

people treated
worldwide with our
medicines in 2019



Lasting...

>30 medicines
on **World Health
Organization** List of
Essential Medicines



... and Sustainable

Among top companies in **Dow Jones
Sustainability Index (Life Sciences Sector)**
for **10** consecutive years

31

**FDA Breakthrough
Designations**

¹ Genentech became a full member of the Roche group in March 2009

The leader in personalized healthcare

Optimally positioning us for the future



Leader in **Diagnostics**

Combining pharmaceuticals and diagnostics under one roof together with deep know-how in molecular biology and data science, make **Roche a unique partner** to drive next step in the evolution of healthcare.



Leader in **Pharma**



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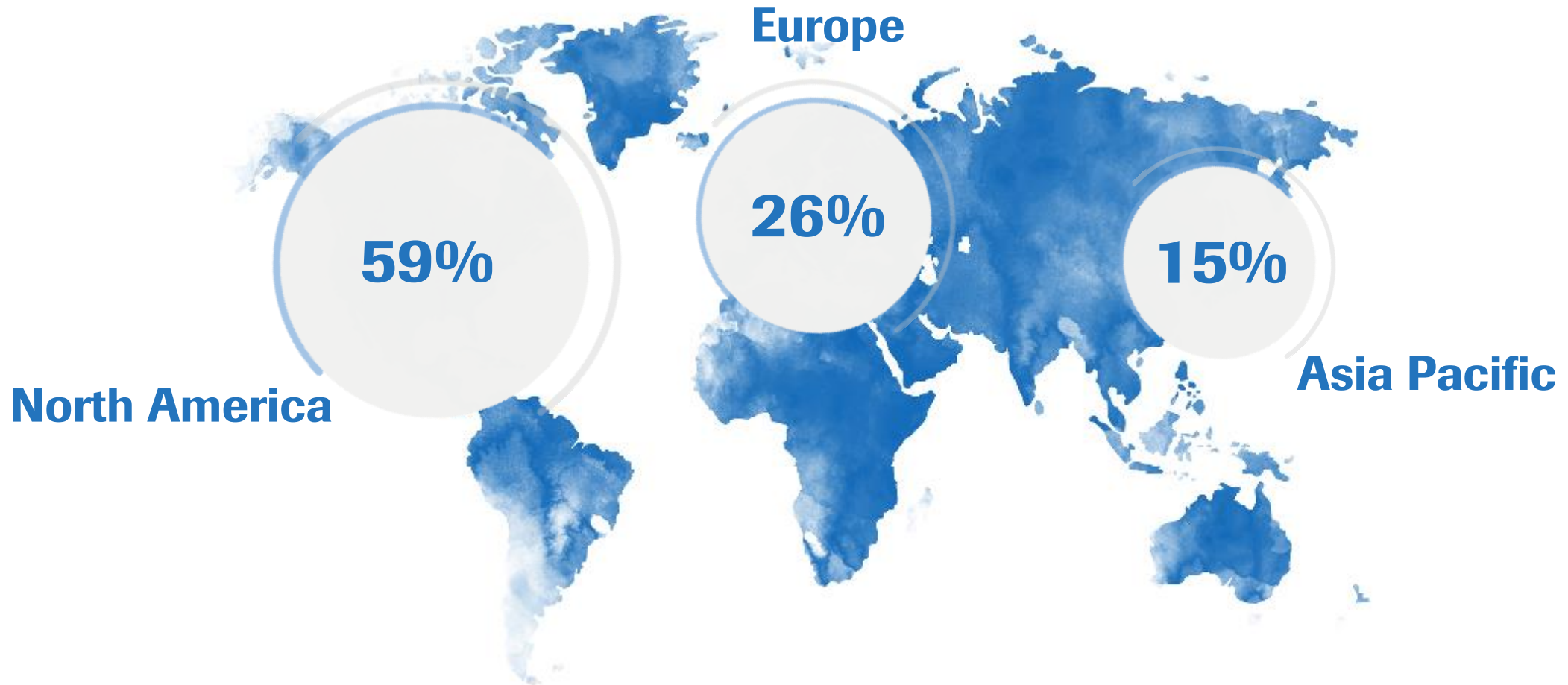
Why we make a
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What we are looking
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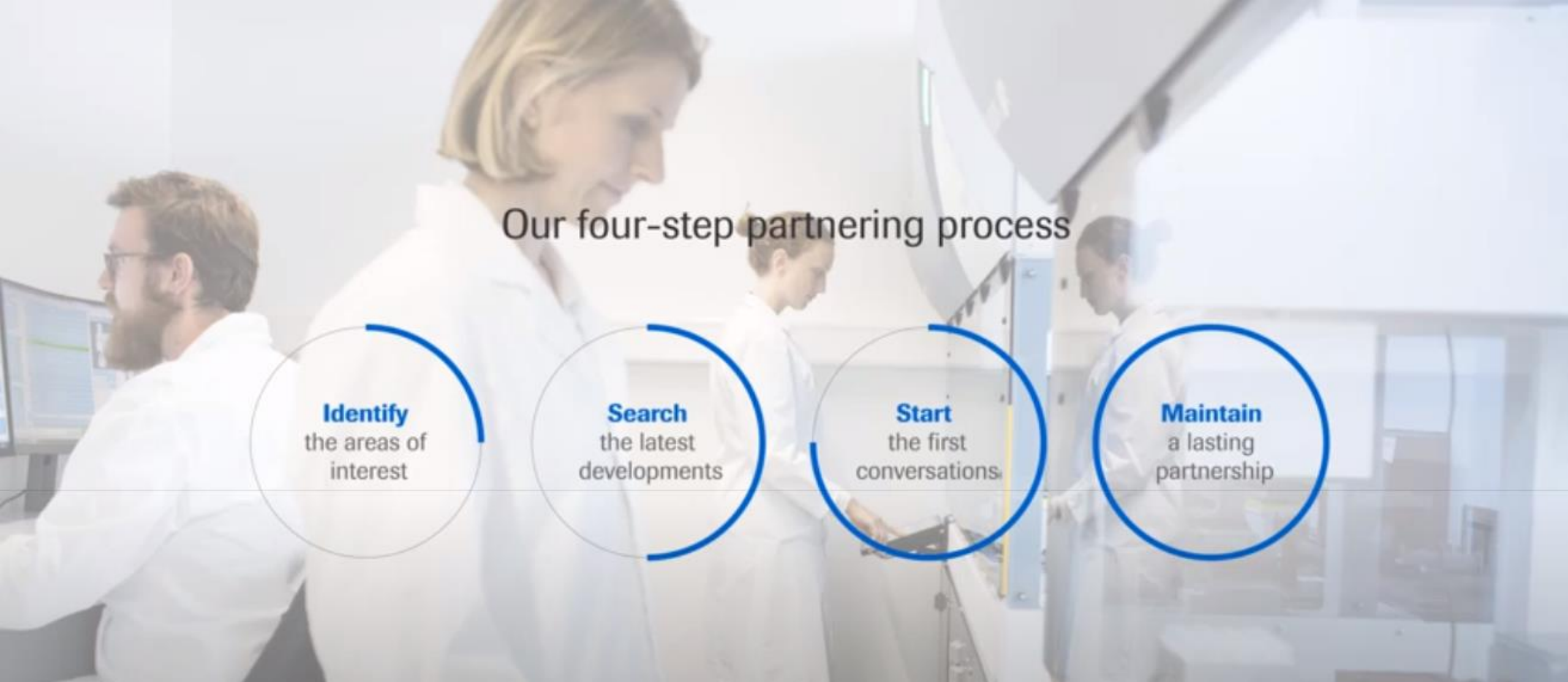
Active partnerships across the globe

Over 220 partnerships across North America, Europe and Asia Pacific



Our approach to Partnering in the Pharma industry

We value external innovation and bring our best experts to the table



Our four-step partnering process

Identify
the areas of
interest

Search
the latest
developments

Start
the first
conversations

Maintain
a lasting
partnership

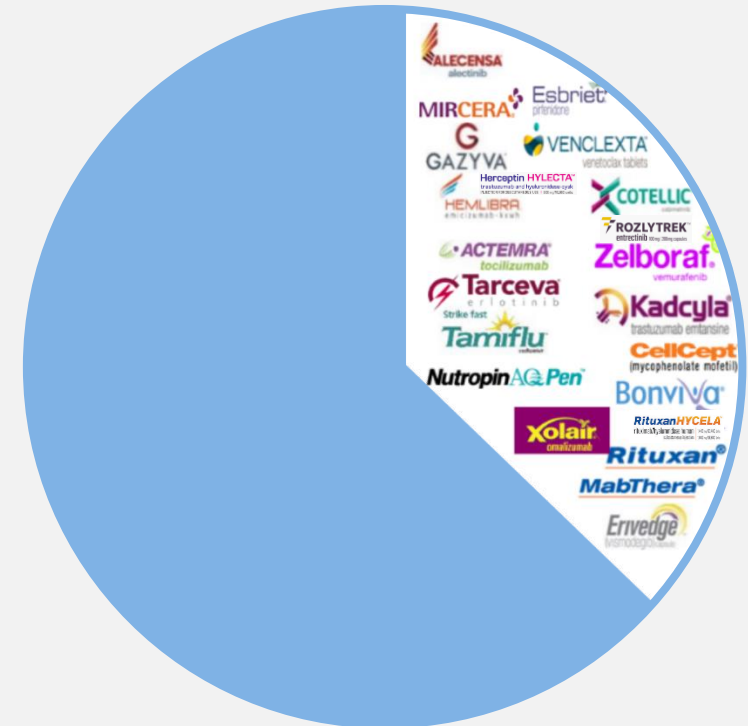
Because a great idea is a great idea... ...no matter where it comes from

~ 50%

of R&D pipeline
involve a partnership

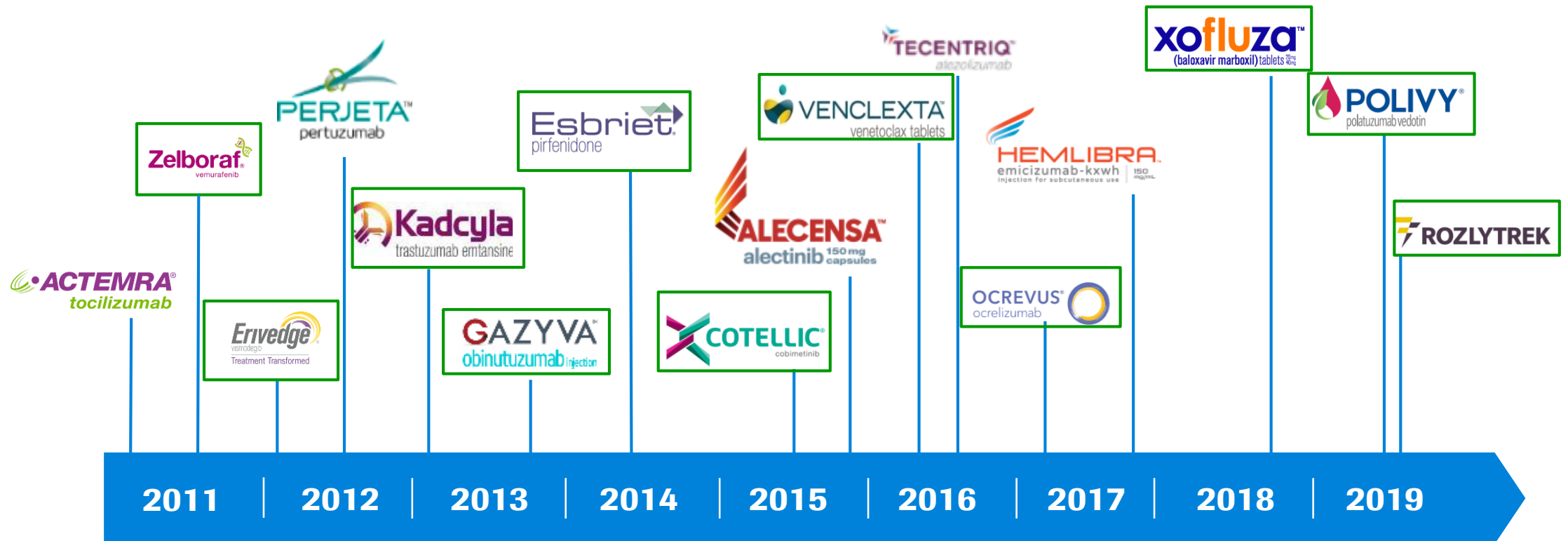
~ 40%

of total Pharma sales
generated from partnered
or in-licensed products



Roche launched 16 new molecules since 2011

11 out of the 16 are partnered medicines



Partnered medicines

We believe in flexibility of deal structures

Tailored for mutual value and partners' wants and needs





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**What we are looking
for from you**

What we are looking for in a partnering opportunity

Innovative science with the potential to make a significant difference for patients

What we are focusing on

- > High disease burden
- > Novel targets
- > Potential for first- or best-in class molecules
- > Novel enabling modalities

What we don't do

- > Generics, biosimilars
- > OTCs
- > Animal Health

What we are looking for

- > Clear connection between MoA and pathobiology
- > Robust data linking MoA, PK and PD
- > Biomarker strategy

Our focus areas

Seeking great science across multiple therapeutic areas

Oncology & Cancer Immunotherapy



- Oncogenic drivers
- Synthetic lethality
- Adaptive and Innate immunity
- Neoantigens
- Stromal biology
- Cell therapies

Immunology & Infectious Diseases



- GI, Respiratory, Rheumatology
 - Innate, Adaptive, Fibrosis, Tolerance and Tissue Regeneration Targets
- Hep B & Respiratory Viruses
- MDR Gram (-) Infections

Neuroscience, Ophthalmology & Rare Diseases



- Neurodegeneration
- Neuroinflammation
- Neurodevelopmental
- Pain (non-opioid treatments for chronic pain)
- Retinal diseases and dry eye disease
- Monogenetic rare diseases

Research Technologies



- Technologies & modalities enabling challenging targets
- Targeted delivery / intracellular delivery
- AI for drug discovery
- Genomic medicine approaches
- Ocular delivery

Digital & Personalized Healthcare



- Robust data sets
- Advanced Analytics (AI incl. Machine learning and deep learning models)
- Digital and mobile technologies

Roche Pharma Partnering

NEUROSCIENCE,
OPHTHALMOLOGY
& RARE DISEASES



Tom Zioncheck

Phone: +41 61 682 17 78

Email: tom.zioncheck@roche.com

J.C. Lopez

Phone: +1 650 467 1877

Email: lopez.julio@gene.com

ONCOLOGY
& CANCER
IMMUNOTHERAPY



Don O'Sullivan

Phone: +1 650 225 4405

Email: osullivan.don@gene.com

Danielle Bittencourt

Phone: +1 650 467 8411

Email: bittencourt.danielle@gene.com

IMMUNOLOGY,
INFECTIOUS DISEASE
& SPECIALTY CARE



Pat Schleck

Phone: +1 973 420 4497

Email: schleckp@gene.com

Karl Yen

Phone: +41 79 573 61 24

Email: karl.yen@roche.com

DIGITAL &
PERSONALIZED
HEALTHCARE



Gregg Talbert

Phone: +1 650 225 6405

Email: talbert.gregg@gene.com

Erika Pollex

Phone: +1 650 303-4960

Email: pollexe@gene.com

RESEARCH
TECHNOLOGIES



Barbara Lueckel

Phone: +41 79 264 3944

Email: barbara.lueckel@roche.com

Mark Schiebler

Phone: +41 79 3611421

Email: mark.schiebler@roche.com

ASIA

Japan and Korea

Kaoru Suzuki

Phone: +81 3 6743 4237

Email: kaoru.suzuki@roche.com

China, Taiwan & Singapore

Yingjie Wu

Phone: +86 21 2894 6153

Email: yingjie.wu@roche.com

ALLIANCE &
ASSET MANAGEMENT

Urs Schleuniger

Phone: +41 61 687 7842

Email: urs.schleuniger@roche.com

R&D OUT-PARTNERING

Joerg Kazenwadel

Phone: + 41 61 687 0524

Email: joerg.kazenwadel@roche.com

COMMUNICATIONS

Tiffany Payette

Phone: +41 79 644 41 60

Email: tiffany.payette@roche.com

Doing now what patients need next