ESG investor event

September 9, 2019
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Vas Narasimhan
Chief Executive Officer
We are a leading medicines company
Powered by advanced therapy platforms and data science

We are a diversified medicines company
Driving growth through cutting-edge platforms
Passionate about productivity and margins
Building a new culture and lasting impact
Culture transformation and building trust with society are key strategic priorities

Building a new culture and lasting impact

Culture transformation

Building trust with society
Our culture transformation
Embracing an inspired, curious and unbossled culture drives performance

Culture transformation

People
- 75% (+3) Engagement (vs. global benchmark)
- 78% (+2) High sense of purpose (vs. Pharma benchmark)

Leadership
- 82% (+3) Manager favorability (vs. global benchmark)
- 100% Of top leaders on Unbossed Leadership Experience

Performance management
- 1 Business Performance Factor
- 16,000+ Associates piloting new schemes
- 3-year Targets for top leaders

1. From internal survey “Our Voice”; 2. From internal survey “Leadership Perspectives 360°”
Novartis materiality assessment¹ consistent with our trust and reputation priorities

1. Interactions with over 200 stakeholders from academia, financial markets, governments, healthcare providers and NGOs – see 2017 Corporate Responsibility Materiality Analysis Materiality assessment webinar series on September 11, 2019: click here for registration
Building trust and reputation with society

- Building trust with society
- Ethical standards
- Global health
- Responsible citizenship
- Pricing and access
Ethical standards

Strengthen, reimagine, drive

- Recruitment, promotion, incentives
- Principle-based decisions
- Trust & Reputation Committee
- Chief Ethics Risk & Compliance Officer
Access challenge...

- 2 billion people worldwide lack access to medicine\(^1\)
- 75% of non communicable disease deaths occur in LMICs\(^2\)
- In the US, 28% <65 years old have no health insurance\(^3\); 1/10 forego medicine because of cost\(^4\)

1. WHO Ten years in Public Health 2007-2017
2. LMICs – low and middle-income countries
3. Centre for Disease Control and Prevention
4. Kaiser Family Foundation analysis of National Health Interview Survey
... addressed through various approaches

- Novartis Healthy Family
- Novartis Access
- Access Principles
- Local Brands
Tackling global health challenges

- Leprosy
- Malaria
- Chagas Disease
- Sickle Cell Disease
- Tropical Diseases
Responsible citizenship

- Ambitious environmental targets
- EPIC¹ Pledge
  - Balanced gender in management
  - Pay equity and transparency
- UN Free & Equal LGBTI² pledge
- 14 weeks parental leave paid for all

1. EPIC – Equal Pay International Coalition  2. LGBTI – Lesbian, gay, bisexual, transgender and intersex
Board and Executive Committee accountability

Board Committees

- Governance, Nomination & Corporate Responsibility
- Audit & Compliance
- Risk

Executive Committee

- Trust & Reputation Committee established 2019 (Chaired by CEO)
- Global Health & Corporate Responsibility + Ethics, Risk & Compliance functions
- Compensation Balanced Scorecard includes culture & trust with society objectives
Continuing to improve transparency

Effect of Novartis Access on availability and price of non-communicable disease medicines in Kenya: a cluster-randomised controlled trial

Peter Cluver, Richard OC, Allen P, Chilukutay, Monica Anyango, Carol Wolfinbarger, Viola Mwiti

Summary

Background: Novartis Access is a Novartis programme that offers a portfolio of non-communicable disease medicines at a wholesale price of USD per treatment per month in low-income and middle-income countries. We evaluated the effect of Novartis Access in Kenya, the first country to receive the programme.

Methods: We did a cluster-randomised controlled trial in eight counties in Kenya. Countries (clusters) were randomly assigned to the intervention or the control group with a country-stratified randomisation procedure that maintained balance on a set of demographic and health variables. In intervention counties, public and non-profit health facilities were allowed to purchase Novartis Access medicines from the Ministry of Essential Drugs and Supplies (MEDS). Data were collected from all facilities served by MEDS and a sample of households in study counties. Households were eligible if they had at least one adult patient who had been diagnosed and prescribed medicines for one of the non-communicable diseases targeted by the programme: hypertension, heart failure, dyslipidemia, type 2 diabetes, arthritis, or breast cancer. Primary outcomes were availability and price of portfolio medicines at health facilities, irrespective of brand, and availability of medicines at patient households. Impact was estimated with intention-to-treat analysis. This trial is registered with Clinical Trials.gov (NCT03279396).

Findings: On March 1, 2016, we randomly assigned eight clusters to intervention (four clusters: 74 health facilities; 342 patients) or control (four clusters: 63 health facilities; 287 patients). 49 intervention and 58 control health facilities, and 386 intervention and 385 control patients were evaluated after a 15-month intervention period (just over February 13, 2018). Novartis Access significantly increased the availability of antidiabetic (balanced odds ratio [GOR] 2.44; 95% CI 1.8 to 3.2; p=0.001) and antihypertensive (GOR 0.48; 0.28 to 0.82; 95% CI 1.44 to 1.56; p=0.030) at health facilities, but did not affect the availability of portfolio medicines (OR 0.65; 0.32 to 1.3; p=0.260) or their price (OR 0.89; 0.51 to 1.5; p=0.690). The programme did not affect medicine availability at patient households (GOR 0.89; 0.32 to 2.9; p=0.756).
Klaus Moosmayer
Chief Ethics Risk & Compliance Officer
Building trust and reputation with society

Building trust with society

Ethical standards

Pricing and access

Global health

Responsible citizenship
We have continued our commitment to uphold high ethical standards

Existing

- Chief Ethics Risk & Compliance Officer
- Principle-based decision-making
- Recruitment, promotion, incentives
- Data analytics

Key priorities

- Strengthen ERC organization
- Code of Ethics
- Human Rights / Third Party Risk Management
- Risk Compass
Ethics, Risk, Compliance: building blocks for a resilient and sustainable corporation

**Ethics**
Embed ethical decision-making to help resolve ethical dilemmas

**Risk**
Strengthen enterprise risk management to increase oversight

**Compliance**
Integrate compliance within systems and process

Driving sustainability, transparency & innovation
Our new Ethics, Risk & Compliance (ERC) organization unites our risk functions

1. Chief Ethics, Risk & Compliance Officer (CERCO) reports into the CEO of Novartis and is a member of the Novartis Executive Committee. CERCO provides updates to the Board Audit & Compliance Committee and Risk Committee on key group material matters.
Code of Ethics equips associates to make better decisions by shifting from rules to principles

Continuing our cultural transformation

2018
Professional Practices Policy (P3)

2019 / 2020
New Code of Ethics

- Elevating principle-based thinking
- Evolving Code of Conduct into new Code of Ethics
- Framework to guide ethical decision making, supported by digital tools
- Foundation for group wide policies and guidelines

Good decisions
Don’t come from a complex set of rules but from clear, principles-based thinking and ethical judgment

Focused on purpose and intent
Risk Compass: mapping and mitigating our risks through an integrated risk management framework

Continuous cycle of the integrated risk management process

1. Assessment
2. Mitigation
3. Monitoring and review
4. Continuous control

Strategic risks reported and discussed at Board level
Human rights and third-party risk management is integral to our commitment

Rolled out a global third party risk assessment program

- Unified global framework to assess third party risks supported by a technology solution
- No engagement with a third party without assessment
- Continuous relationship and risk monitoring

Risks assessed

- Anti-bribery
- Health, safety, environment
- Quality
- Labour rights
- IT, data privacy, animal welfare
- Human rights

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1. Scope – suppliers, research collaborators, product in-licensing
Leveraging technology and being more predictive about our risks

**Descriptive analytics**
- Identify trends, outliers
- Monitor key metrics

**Diagnostic analytics**
- Root cause analysis
- Correlation across 3 lines of defense

**Predictive analytics**
- Trends in relationships between variables, strength of their correlation
- Likelihood, potential impact

<table>
<thead>
<tr>
<th>2018</th>
<th>2019</th>
<th>2020+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Looking into the past</td>
<td></td>
<td>Predicting the future</td>
</tr>
</tbody>
</table>

*Illustrative*
Continuing our commitment to uphold high ethical standards

- New Code of Ethics
- Global policy governance around principles
- Leveraging data analytics
- Human Rights
- Third Party Risk Management program
- Integrated risk management
Building trust with society a top priority

Industry has lost much goodwill and it is right for society to have high expectations towards integrity and ethical behavior.

We still have plenty of work to do but we remain committed with our ongoing efforts.

Society’s trust is essential to accomplishing our goals.
Patrice Matchaba
Group Head of Global Health & Corporate Responsibility
Building trust and reputation with society

Building trust with society

Ethical standards

Global health

Pricing and access

Responsible citizenship
Evolved corporate responsibility from donation to integration into core drug innovation process

2000
Sole donor to the WHO of multi drug therapy for leprosy

2001
Antimalarial Coartem® (no-loss strategy)

2008
Health Family¹,²

2014
Local innovative brands in LMIC

2015
Novartis Access³

2017
Novartis Access Principles

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¹. Education / medicines to patients at the bottom of the income pyramid
². China “Health Express” (JKKC) launched 2010 (see appendix)
³. 15 off-patent medicines for NCDs
Novartis Access and Healthy Family reached 10m people in 2018

No. of people (incl. patients) reached\(^1\) millions

<table>
<thead>
<tr>
<th>Year</th>
<th>Healthy Family</th>
<th>Novartis Access</th>
<th>China Health Express (^3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>10</td>
<td>2m patients</td>
<td></td>
</tr>
</tbody>
</table>

2m patients reached through medicines 2018

Working across multiple countries

Novel sustainable business models – generated sales of >USD 25m over 3 years to 2018\(^1\)

1. People reached / sales for Healthy Family and Novartis Access
2. Preparing for 1st treatment deliveries
3. >2m students, >780k residents, >130k doctors reached;

Novartis ESG investor event | September 9, 2019
Our access principles address innovation (R&D), affordability and healthcare systems

R&D
Systematically assess portfolio against unmet needs

Affordability
Effective affordability strategies and innovative solutions

Systems strengthening
Lower local barriers to healthcare delivery
Making innovation affordable
Through Local Brands, creating new opportunities

Number of patients reached¹
thousands

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019 YTD²</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>21</td>
<td>99</td>
<td>140</td>
<td>256</td>
</tr>
</tbody>
</table>

185 Local Brands approved¹

<table>
<thead>
<tr>
<th>No. by brand</th>
<th>No. by region</th>
</tr>
</thead>
<tbody>
<tr>
<td>47</td>
<td>Asia Pacific, Middle East, Africa</td>
</tr>
<tr>
<td>32</td>
<td>Latin America, Canada</td>
</tr>
<tr>
<td>33</td>
<td>Europe</td>
</tr>
<tr>
<td>29</td>
<td>Others</td>
</tr>
</tbody>
</table>

Generated sales of over USD 193m since 2016; across >50 developing markets²

1. Local Brands for Novartis Pharmaceuticals (excludes Oncology local brands)  
2. As of July 2019
Making innovation accessible
Through reducing launch time-lags and implementing access plans

<table>
<thead>
<tr>
<th>Brand</th>
<th>Time-lag for LMICs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entresto®</td>
<td>12 months</td>
</tr>
<tr>
<td>Cosentyx®</td>
<td>10 months</td>
</tr>
<tr>
<td>aimovig™</td>
<td>7 months</td>
</tr>
<tr>
<td>RYDAPT®</td>
<td>16 months</td>
</tr>
<tr>
<td>KISQALI®</td>
<td>5 months</td>
</tr>
</tbody>
</table>

Previous time-lag:
24 – 48 months following launch in developed economies

<table>
<thead>
<tr>
<th>2019</th>
<th>2020</th>
<th>Access plans in place for new launches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entresto®</td>
<td>Entresto®</td>
<td>PIQRAY®</td>
</tr>
<tr>
<td>Cosentyx®</td>
<td>Cosentyx®</td>
<td>MAYZENT.</td>
</tr>
<tr>
<td>aimovig™</td>
<td>aimovig™</td>
<td></td>
</tr>
<tr>
<td>RYDAPT®</td>
<td>RYDAPT®</td>
<td>Brolucizumab (RTH258)</td>
</tr>
<tr>
<td>KISQALI®</td>
<td>KISQALI®</td>
<td>Crizanlizumab (SEG101)</td>
</tr>
</tbody>
</table>
Building trust and reputation with society

Building trust with society

Ethical standards

Pricing and access

Global health

Responsible citizenship
Leprosy

C.200,000 new cases annually\(^1\)

- Global partnership for Zero Leprosy
- Reached +7m patients, pledge to reach another 1.3m by 2020
- Image recognition for AI diagnostic support (Microsoft\textsuperscript{®}, Fiocruz Foundation)
- Post-exposure prophylaxis program included in WHO leprosy strategy

\(^1\) http://www.searo.who.int/entity/global_leprosy_programme/topics/factsheet/en/

Novartis ESG investor event | September 9, 2019
Malaria
219m cases across 87 countries¹

- 2001 WHO agreement
- 900m malaria treatments across Africa, Asia and Latin America
  - Including 370m courses of Coartem® pediatric formulation
- 2 new compounds under development: cipargamin and ganaplacid
- Committed USD 100m in R&D over the next 5 years²

Chagas Disease
Affects ~6m people worldwide¹

- Cardiac complications
- Phase IV study Entresto®
- Global Chagas Coalition
- Chagas Roadmap
- NIBR exploring a candidate for treating acute phase

Tropical diseases
Affects 2.4m people\textsuperscript{1}

- FDA approval for Egaten\textsuperscript{®} for the treatment of fascioliasis
- Only treatment recommended by WHO
- Treated \~2m patients in >30 countries
- Priority Review Voucher – recognized as neglected tropical disease by FDA
- Promising early pipeline to address leishmaniasis, Chagas disease and cryptosporidium-induced diarrhea

\textsuperscript{1} http://www.who.int/news-room/fact-sheets/detail/Chagas-disease(American-trypansomiasis)
Sickle Cell Disease
250 million carry the gene\(^1\)

- **Affordability**
  - Essential medicines in Sandoz and Oncology portfolio
  - 60k packs of hydroxyurea delivered to Ghana

- **Research & Development**
  - Hydroxyurea pediatric formulation
  - Crizanlizumab (SEG101)\(^2\)

- **Healthcare systems**
  - Zipline\(^\text{®}\): end-to-end supply chain control, avoiding counterfeit risk
  - Africa Sickle Cell Initiative\(^3\): newborn screening, treatment guidelines, hydroxyurea registration in Ghana, clinical trials, training and education

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2. Received FDA priority review  
3. In partnership with Ministry of Health, Ghana Health Service and Ghana Sickle Cell Foundation
Vas Narasimhan
Chief Executive Officer
Building trust and reputation with society

Building trust with society

Ethical standards

Pricing and access

Global health

Responsible citizenship
## Ambitious environmental targets in place

<table>
<thead>
<tr>
<th></th>
<th>2025</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Climate</strong></td>
<td>Carbon neutral in our own operations (Scope 1 and 2)&lt;sup&gt;1&lt;/sup&gt;</td>
<td>Carbon footprint reduced by half (Scope 1, 2 and 3)&lt;sup&gt;1&lt;/sup&gt;</td>
</tr>
<tr>
<td><strong>Waste</strong></td>
<td>Waste disposal reduced by half</td>
<td>Plastic neutral&lt;sup&gt;2&lt;/sup&gt;</td>
</tr>
<tr>
<td><strong>Water</strong></td>
<td>Water consumption reduced by half in our operations</td>
<td>Water neutrality and water quality wherever we operate</td>
</tr>
<tr>
<td></td>
<td>No water quality impacts from manufacturing effluents</td>
<td></td>
</tr>
</tbody>
</table>

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1. Scope 1 are emissions from sources that are owned or controlled by Novartis. Scope 2 are emissions from the consumption of purchased energy (e.g. electricity) and Scope 3 are emissions that are a consequence of Novartis operations (e.g. supply chain, business travel).

2. Weight of plastic packaging entering the environment for disposal is approximately the same as the weight being recovered for recycling.
On track to fulfilling our pledges on pay equity and D&I

<table>
<thead>
<tr>
<th>Our pledge</th>
<th>Our progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular gender pay equity statistical analyses and remediate annually as</td>
<td>• Implemented in 11 countries</td>
</tr>
<tr>
<td>appropriate</td>
<td>• Completion expected by 2023</td>
</tr>
<tr>
<td>Eliminate use of historical salary data when making internal and external</td>
<td>• Implemented in 8 countries (40% of global hiring)</td>
</tr>
<tr>
<td>offers</td>
<td>• 43% of management roles filled by women</td>
</tr>
<tr>
<td>Gender-balanced representation in management in the next 5 years</td>
<td>• Aspiration for gender-balanced by 2023</td>
</tr>
<tr>
<td>Sharing with associates their pay vs. benchmarks</td>
<td>• Implemented in France</td>
</tr>
<tr>
<td></td>
<td>• 23 countries expected by 2023</td>
</tr>
</tbody>
</table>

1st Pharma company to sign UN Standards of Conduct for Business, tackling discrimination against LGBTI
Participating in the Stonewall Global Workplace Equality Index to identify actions to address any potential barriers
Active support to the LGBTI community through policy changes, inclusion learning offerings, listening dialogues
We are looking to the future...
Appendix
“First randomized controlled trial assessing the effect of a pharmaceutical industry-led access to medicines programme”¹

Findings

Poorest patients pay the most

Multiple factors inhibiting impact: awareness and level of screening, diagnosis, and monitoring, misaligned policies at country level

Patients diagnosed in public sector but tend to purchase treatment in private sector

Lessons Learned

Reaching patients where it matters
Partnered with private distributors to ensure reach

Increasing impact of public-private partnerships
More targeted intervention and linkages between levels of care – community to facilities

¹ Effect of Novartis Access on availability and price of non-communicable disease medicines in Kenya: a cluster-randomised controlled trial.
Population size
In % per income segment

<table>
<thead>
<tr>
<th>Income Segment</th>
<th>Population Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Income</td>
<td>7%</td>
</tr>
<tr>
<td>Upper-middle to high income</td>
<td>9%</td>
</tr>
<tr>
<td>Middle income</td>
<td>13%</td>
</tr>
<tr>
<td>Low income</td>
<td>55%</td>
</tr>
<tr>
<td>Poor</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Approaches**

- **Original brands**
- Generics
- Tenders

- **Patient assistance programs**
- Novartis Access
- Novartis Healthy Family
- Novartis Malaria Initiative

- **Generics**
- Differential pricing
- Patient assistance programs
- Strategic philanthropy
- Tenders

- **Donations**
- Strategic philanthropy
- Tenders
Developing effective affordability strategies and strengthening healthcare systems

Novartis Access and Healthy Family

Making innovation affordable
- Local Brands

Making innovation accessible
- Systematic review of Access plans for key brands
- Reducing launch time lag

Leveraging technology
- Zipline® collaboration
- Last Mile Health

Next Generation Scientist
Assessing our R&D portfolio against unmet needs

Novartis Working Group for Adaptive R&D

Development of new formulations
- Coartem®, Diovan®

Expansion of clinical use of existing medicines
- Certican®, Entresto®, Femara®, hydroxyurea, inhaled COPD portfolio, Lamprene®, Myfortic®, ophthalmology portfolio

Research to better understand issues of relevance for adaptive development
- African-specific CY92D6 polymorphisms
**Novartis Access, Healthy Family and new social businesses future strategy to increase impact**

Non-communicable diseases highly prevalent, undiagnosed, untreated - Novartis Access and Healthy Family aims to reach more people with awareness creation, information on prevention, diagnosis and treatment

<table>
<thead>
<tr>
<th>India</th>
<th>Vietnam</th>
<th>Rwanda, Uganda, Tanzania, Nepal, Laos, Cambodia Sandoz: Nigeria, India, Sudan, Kenya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deepen Healthy Family business in 11 states with already existing operations</td>
<td>6 new provinces planned to be included</td>
<td>Shift of select, potential high–volume countries to programs</td>
</tr>
<tr>
<td>Start new operations in 2 new states (Haryana, Orissa)</td>
<td>Coordinated business &amp; market development, i.e. invest in developing potential future growth markets that will be handed over to Novartis business divisions when matured and when access to essential health care has improved</td>
<td></td>
</tr>
</tbody>
</table>
“Health Express” (JKKC) - China

- 2010: Launched to promote health education and healthcare in Xinjiang
- 2011: Infectious diseases physician training
- 2012: Chronic disease management project
- 2014: Hospital management course
- 2018: TB prevention and treatment course
- +1.9m students, +780k residents, +130k doctors reached
Managing Risks: Anti-counterfeiting

10% of medical products in low and middle-income countries is substandard or falsified\(^1\)

- **Governance**: Steering Committee, working group, presented to ECN

- **Stakeholder engagement**: Public awareness, capacity building, patient & advocacy

- **Intelligence & enforcement**: Sharing intelligence with law enforcement

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\(^1\) [https://www.who.int/news-room/fact-sheets/detail/substandard-and-falsified-medical-products](https://www.who.int/news-room/fact-sheets/detail/substandard-and-falsified-medical-products)
Managing Risks: Patient safety

- >1.2k Safety associates, 850k annual vigilance cases, 1.2k products, 530 trials
- Chief Medical Office for patient policy and standards
- Single organization for pharma/device vigilance
- Harmonized product stewardship
- Deployed Commitment to Patients and Caregivers
End stage renal disease is a big burden to patients and families in sub-Saharan Africa.

Public–private partnership between Kenyatta National Hospital and Novartis.

Significant outcomes:
- 188 local transplants
- 34 transplant specialists trained
- 2 fully equipped transplant teams
- Transplant cost reduced to USD 5k from USD 20k
Next Generation Scientist

- Partnership with University of Basel
- 3-month research internship
- 30 countries across Africa, Latin America, Asia
- 80+ different affiliated institutions
- 183 scientists / clinicians participated since 2011
- ~20 scientists per year (Masters, PhD, Post-Doc)