IFPMA Ethoscope

IFPMA Note for Guidance on educational and scientific events*

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EXECUTIVE SUMMARY

The IFPMA Note for Guidance sets out global principles to help ensure that educational and scientific events involving healthcare professionals (HCPs) are conducted ethically, transparently, and with a clear focus on improving patient care.

It reinforces that collaboration between the pharmaceutical industry and HCPs is essential to advancing medical knowledge but must never result in undue influence.

This Guidance applies to Company Programs, where the pharmaceutical company is responsible for organization and funding, and Third-Party Events, supported by industry, across all formats — in person, virtual, and hybrid.

- **Educational purpose only** - Events must provide legitimate, non-promotional scientific or medical education and address clearly identified learning needs of HCPs.
- **Independence and integrity -** Support for HCP participation must be based solely on professional relevance and must never be linked to prescribing or other commercial considerations.
- **Appropriate support -** Companies may cover necessary costs (e.g., registration, travel, accommodation) at fair market value, limited strictly to the duration and purpose of the event.
- **Suitable venues and modest hospitality -** Locations and venues must be appropriate for scientific exchange and not selected for leisure or entertainment appeal. Hospitality must be reasonable and strictly secondary to the educational purpose.
- **Robust governance -** Decisions should be well-documented, independent of sales functions, and designed to avoid even the perception of undue influence.
- **Applicability across formats -** These principles apply consistently to in-person, virtual, and hybrid events, with specific safeguards for virtual international congresses.

The Note for Guidance ensures that industry-supported educational activities contribute to high-quality medical education and improved patient outcomes, while upholding trust, transparency, and the independence of healthcare professionals.

1. Introduction and Scope

The Ethos of the International Federation of Pharmaceutical Manufacturers and Associations (IFPMA) is centered on trust to "act with integrity and honesty to improve patient care and build trust with those we serve and to respect the independence of healthcare providers, patients and other stakeholders."

A key principle of the Ethos is Education, recognizing that providing Healthcare Professionals (HCPs) with education and opportunities for scientific exchange is critical in ensuring that HCPs obtain the latest and most accurate information and insights on therapeutic areas and related interventions to improve patient care and enhance the healthcare system overall.

In line with IFPMA's Ethos and our social responsibility, IFPMA member companies ("Companies") are committed

to furthering access to quality education for qualified HCPs. The IFPMA Code of Practice (Article 7) sets global standards for industry-organized or industry-supported events and meetings for HCPs. This Guidance aims to provide good practice considerations to Companies in ensuring that these educational opportunities are supported only for their stated purpose and never to unduly influence HCPs. It must be read with the spirit of the IFPMA Code in mind and always in accordance with applicable laws and regulations and other applicable national and regional industry codes. Where national or regional codes provide stricter requirements, those must be followed.

The purpose of this Guidance is to support Companies in making ethical decisions when providing these educational opportunities which fall into two categories:

1. Company-organized programs ("**Company Programs**"). For purposes of this Guidance, Company Programs are defined as scientific meetings addressing human health and disease-specific learning needs for which ownership, accountability and funding belong to a Company.

2. Support for third-party symposia, congresses and other scientific or professional meetings ("**Third-Party Events**") through event funding or sponsorship, and support for HCP attendance.

This Guidance is not intended to inform ethical decision-making for company-driven promotional events. That said, several elements outlined in this Guidance may still be useful when planning promotional activities. For example, the sections on venue selection, hospitality, and remuneration may help inform decisions in those contexts.

In addition, Section 3 contains specific rules applicable to virtual international medical congresses involving HCPs from multiple countries, and activities organized by Companies at such congresses (e.g., satellite symposia). Accordingly, Section 3 has a narrower and more specific scope than the general principles set out in Section 2.

FORMAT-SPECIFIC APPLICABILITY

This Guidance applies to Company Programs and Third-Party Events in all formats — in-person, virtual, and hybrid.

For virtual events (and the virtual components of hybrid events), the relevant principles in Section 2 apply (e.g., purpose, educational value, HCP selection, governance). Provisions referring to physical venues, hospitality, travel, or other in-person arrangements apply only where an in-person component exists. Section 3 should therefore be read as a supplement to Section 2, setting out additional requirements specifically for virtual international medical congresses.

2. Key principles for Company-Programs and Third-Party Events support

2.1. Educational/scientific events

The purpose and focus of Company Programs and Third-Party Events should be to provide legitimate non-promotional medical or scientific education for HCPs. These activities may cover therapeutic areas and products to advance patient care but should never promote products and unduly influence prescribing decisions. Other activities may occur in parallel at these events but should not be the intent or focus of the education being provided.

Questions to consider in assessing the quality and appropriateness of Company Programs and Third-Party Events include:

- Does the program meet clearly identified educational needs and is it relevant to the target audience?
- Are the program content and associated materials aligned with local laws, regulations, industry code(s) and other relevant standards allowing industry to support?
- Is there a sufficiently robust and transparent scientific agenda, with a clear focus on education and scientific exchange?
- Does the agenda exclude inappropriate hospitality or entertainment?

2.2. Support for HCP attendance

Support of HCP attendance by Companies should be based on the relevance of the Company Program or Third-Party Event for individual HCPs depending on their expertise, qualifications, experience, and educational needs. Due consideration should also be given to whether the individual support furthers the industry's commitment to access to quality education.

Support to attend Company Programs and Third-Party Events cannot be conditioned on or offered as a reward for prescription, recommendation, purchase, supply, administration or promotion of any pharmaceutical product or therapies.

Where HCPs are being selected for attendance at a Company Program or Third-Party Event by companies directly, questions Companies can consider in evaluating that selection include:

- Are the HCP's specialty, expertise, knowledge, experience, and areas of scientific or medical interest directly related to the meeting's purpose, content and agenda and will the content enhance quality of care provided to patients?
- For international Company Programs or Third-Party Events, does the HCP have sufficient proficiency in the official language(s) of the Program or Event?
- Would the support provide an opportunity for scientific education and exchange that might otherwise not be available to the HCP (e.g., due to financial or other constraints, scarcity of local educational opportunities)?
- Is the geographic location of the meeting reasonable for the specific HCP in light of the agenda and other available educational opportunities that might require no/less travel?

In all instances, decisions to support HCPs' attendance at Third-Party Events must be independent of sales considerations. Companies should consider added scrutiny for international Third-Party Events, e.g. review and/or approval by appropriate roles or functions not incentivized by sales.

Where feasible and appropriate in line with educational objectives, Companies should consider supporting virtual attendance for HCPs who will not be speakers, poster presenters or who will not otherwise have an "active" role at the Company Program or Third-Party Event. See section 3 for Guidance on virtual international medical congresses.

Company support can include only registration fees, travel, accommodation and meals for the duration of the Company Program or Third-Party Event, and these must reflect fair market value and comply with any local thresholds. Where possible these costs should be paid directly to the service provider (e.g., travel company, third-party meeting organizer), with no direct travel and expense reimbursement to HCPs. Where HCPs are reimbursed for costs paid upfront, these must be supported by appropriate documentation/justification.

Except in cases of medical necessity, Companies may not cover or facilitate the organization of any arrangements or costs for individuals accompanying invited HCPs.

Companies and/or their local affiliates should consider establishing appropriate governance to ensure relevance and reasonableness of support, and to minimize the risk of real or perceived undue influence. Companies should clearly document their rationale for supporting any event.

2.3. Conducive locations & venues

Companies should only organize Company Programs and sponsor Third-Party Events in or near HCPs' country of practice and should generally aim to minimize travel for attendees, unless logistics or security considerations require another location. The program for an event may justify a particular location, including international locations deriving participants from many countries, if there are valid and legitimate reasons for that location such as the availability of relevant research facilities (e.g. universities).

The destination should not be the main attraction of the event, should not be exclusively known for its tourist, cultural or recreational offering and should not be selected specifically to take place at the same time with any internationally recognized major sporting or cultural events taking place in the same destination and at the same time.

Where an exception applies, it should be demonstrated and documented that the timing of the event does not create an inappropriate attraction, and that the location is otherwise appropriate for scientific and educational meetings.
Even in these situations, the location should generally be in or near a scientific or business center conducive to the exchange of education and ideas (e.g. near hospitals, universities or research centres). Examples of inappropriate locations could include ski centers, beach resorts during associated holiday seasons, or a city hosting a major tourist event at the same time as the event.

The appropriateness of a location may be assessed differently for strictly local events attended by local HCPs as opposed to regional or international events. Destination assessments should take into consideration – among other criteria – where participants are coming from to ensure easy access and overall efficient travel arrangements. Hence, an approval for a specific destination might be favorable for a local event but not for a regional or global one.

Venues must be conducive to the scientific or educational objectives and the purpose of the Company Program or Third-Party Event. This requires that:

- The venue provides safe and secure meeting facilities;
- The venue has the necessary business and technical facilities to accommodate the meeting and its participants; and
- The meeting facilities are accessible only to intended audiences, with due consideration to privacy.

Extravagant venues must be avoided, even if the cost might be low compared to other venues. If a venue is renowned for its entertainment, sports, or other leisure activities, and Companies still choose to proceed with sponsorship, Companies must be able to compellingly demonstrate and document that it nevertheless remains appropriate for scientific and educational meetings under consideration. In their assessment, Companies should always consider how the public, media and/or authorities may perceive the venue, including whether it could be viewed as a solely luxury, tourist, holiday and/or entertainment facility.

2.4. Reasonable hospitality

Hospitality should be modest, incidental and reasonable based on meeting duration, limited to reasonable hotel accommodation and meals (e.g., coffee breaks, lunches, conference dinners, welcome reception).

Refreshments and/or meals incidental to the main purpose of the Company Program or Third-Party Event can be provided to participants; hospitality cannot be offered to, arranged for, or paid for non-event participants. These must be moderate and reasonable as judged by local standards and should be set by local industry associations and/or Companies.

Companies may not organize or cover the costs of entertainment or other leisure or social activities, nor should they sponsor HCP participation in such activities.

There may be circumstances where independent third-party organized events provide opportunities for social, sporting and/or leisure activities alongside the program. These should be outside of the scientific schedule and not interfere with the overall scientific content of the program. Any such activities should be subject to a separate fee, and this information should be made clear in the program or event website, which would need to be paid by the HCP themselves rather than any company sponsorship or support.

Questions to consider in assessing the reasonableness of hospitality include:

- Does the program description include items that could appear excessive (e.g., champagne reception, gala dinner)?
- Is there unreasonable or frequent traveling for meals during the event?
- Are meals arranged in tourist attractions?
- In the case of Third-Party Events including entertainment, is it clear that sponsoring Companies will not be funding these activities?

Companies should consider implementing contractual agreements with the third-party organizers stating that their funding is to be used exclusively for the advancement of science and provision of education and not for entertainment or other leisure activities. Ideally, the third-party organizer would be requested to provide a transparent cost breakdown, with any entertainment and leisure activities clearly carved out/excluded from covered registration fees, and third-party organizers should be requested to clearly state the scope of company support in the program and the organizer's webpage.

Additional provisions related to events and meetings can be found in the IFPMA Code of Practice, Article 7- Interactions with Healthcare Professionals (e.g. gifts prohibition, distribution of materials during congresses).

3. Special guidance on virtual international medical congresses

3.1. Scope

The following guidance applies to virtual international medical congresses organized by medical associations/societies involving HCPs from multiple countries, and activities organized by Companies at these congresses (e.g. virtual exhibition stands or virtual satellite symposia). Specifically, this guidance sets out factors Companies should consider when determining which code and/or label to use as reference for the Company activities at such virtual international congresses.

This Guidance is not intended to apply to all virtual meeting formats. Specifically, it does not cover:

- National congresses organized by medical associations/societies in one country with a focus on HCPs from that country
- Company-owned events (in contrary to Company activities within a virtual international congress organized by medical associations/societies)

That said, several of the considerations outlined in this section may still be useful when planning these types of virtual events, such as attendee identification and access.

3.2. Purpose

As referenced in Section 1 above, the IFPMA Code of Practice (Article 7) sets global standards for industry support for a wide range of local, national, and international meetings, organized by third parties, providing funding to assist in the medical education of HCPs, sponsorships to medical societies organizing events, hiring of exhibition space, support of speakers, etc. (see Section 2 for details). While these requirements were originally developed for in-person meetings, they apply similarly to virtual formats. In all cases, support and attendance should be based on the event's educational value, considering the educational program, overall cost, nature of the audience, cybersecurity and privacy arrangements, and the overall impression given by all the various arrangements.

The IFPMA's Ethos and Code of Practice provisions also cover the appropriate communication of promotional and non-promotional information during international medical congresses, deferring to host country regulations in instances where medicine is not approved in the host country or not approved in the country of a participating HCP. In the context of virtual meetings, the notion of "host country" may not be directly applicable, and this guidance seeks to replicate the Codes' pragmatic approach in the virtual format. This guidance aims to inform other stakeholders

such as medical associations/societies, third party organizers, etc. about the arrangements Companies should fulfill in a virtual setting.

3.3. Key principles

Activities organized by a Company (e.g. exhibition stands, satellite symposia) associated with a virtual international medical congress should comply with the following requirements:

- When reviewing their activities and respective materials, Companies should consider the code of the region from which the majority of delegates would be expected to come, based on past experience. When there is no regional code, the IFPMA Code applies, unless local laws or other applicable requirements provide otherwise. This particular code may be referred to for adjudication purposes, as may the code of where the individual attendees come from. When considering the distribution or display of promotional material at international congresses and assuming the majority of delegates are expected to be from Europe, member companies should consider European label for the products being discussed.

3.4. Attendee identification and access

- The selection of the relevant industry code should be based on industry practice.
- As the scientific congress consists of a (1) core congress program fully under the responsibility of the medical society and without any industry involvement and of (2) industry activities, e.g., exhibition, satellite activities etc., the relevant Industry code applies to the latter. Companies should clearly identify the label which (promotional) materials reflect, to avoid any possible confusion. Promotional material must be

accompanied by a statement indicating the countries in which the medicinal product is registered, and by an explanatory statement indicating that registration conditions may differ internationally. Additionally, the statement should be prominently displayed (e.g. via a pop-up box or alternative display) informing delegates to refer to prescribing information from their home country as information may be different for each country (see explanatory statements/disclaimer examples below). From an access perspective, the system should identify "Healthcare Professionals" versus all other roles / professions, to ensure that access to the above mentioned "industry activities" is only granted to these Healthcare Professionals.

- Companies should ensure that a process is in place to confirm participants' status as HCPs/Non-HCPs (patient advocates, journalists, industry representatives, etc.). It is expected that they will work with the medical association(s) to ensure that the congress' virtual platforms allow for participant categorization, and to work with the medical association/society (congress owner) to make reasonable efforts to restrict access to promotional material to HCPs only, where required by applicable rules and regulations. Where the medical association's platform does not have a categorization capability, Companies should consider alternative mechanisms to enable attendee classification for their promotional section. Where it is impossible to restrict access to HCPs due to the congress platform or equivalent, there must be a clear statement to the attendee that the materials/communication are designed and intended for HCPs only.

- Restrictions intended for non-HCPs are not meant to exclude Company representatives or third parties engaged by industry where the content or access is relevant to their role.

- Congress attendees participating virtually should sign digital consent indicating awareness/acknowledging the terms and conditions of a virtual congress, such as specific permission to access different virtual areas (lectures, commercial expositions, social engagement sites, the basis of promotional material development, etc.). Even if this is the responsibility of the medical association/society, they should align with the industry on the wording of these kinds of explanatory statements/disclaimers. Companies need to have a lawful basis (e.g. consent) for sharing personal data with the medical association/society in case they are registering HCPs for the congress.

- The medical association/society has to ensure that data privacy requirements are embedded in the overall congress platform (e.g. registration, access controls to different sections like commercial exhibition or scientific sessions).

- Technology is developing quickly and this document provides the overall framework for all geographies. Where feasible, reasonable efforts for geotagging by the medical associations/societies should be considered.

3.5. Congress websites and material

- To avoid confusion it is recommended that the website and documents of a virtual international congress do not use visuals of a specific country or city. Since virtual events have no link to a specific location, national codes can only apply regarding HCP sponsorship. Regarding any industry activities at the virtual congress, the regional (e.g. EFPIA Code) or IFPMA Code applies.

- Congress materials including microsites and other related websites, where possible, should be accessible from the congress platform with no direct access from links, websites, or search engines. It must be clear to the viewer that the materials are part of the congress.

3.6. Explanatory statements/Disclaimers

As stated above, Companies should include a statement explaining to delegates when entering their virtual booth/exhibition that help them understand the context by which the material was developed and to highlight that the content may not be applicable to their country.

Examples include:

- "You are viewing an international virtual congress run by [society name] and provided to international HCPs from around the world. Please note that prescribing information provided here may vary depending on local approval in each country. For purposes of [congress name], best efforts were undertaken by [society name] and congress sponsors to ensure compliance with [relevant code]. However, you should review your local prescribing information and consult directly the local affiliate of the relevant company to address any questions."

- "The materials for [PRODUCT(S)] contained in this virtual exhibition are approved for use only in [COUNTRY]. Prescribing information may vary depending on local approval in each country. Therefore, before prescribing any product, always refer to local materials such as the prescribing information and/or the Summary of Product Characteristics (SPC)."

4. Hybrid congresses

As hybrid congresses include both in-person (registered attendees) and virtual elements, the principles of the country code applicable to the in-person location should apply to the congress elements and activities. Symposia streamed into a hub should generally follow the jurisdiction of the primary physical location of the meeting.

If a congress setup is not covered by the recommendations in this document (e.g. multiple regional live congress hubs joining together in a hybrid congress), the applicable code reference should be aligned between the medical society and participating companies through a Congress Industry Roundtable, taking into account the considerations outlined in this document.

5. Definitions

- **Congress Hub** is a local/regional, secondary to the main congress location, live set up providing congress experience to a subgroup of the registered attendees while being virtually connected to the main congress live program. Congress Hubs can take many different forms.

- **EFPIA Code** is the Code of Practice of the European Federation of the Pharmaceutical Industries and Associations (EFPIA). You can find the EFPIA Code here.
- Legal and Ethical Rules governing medical congresses: https://www.efpia.eu/media/k2ebhum4/rules-governing-medical-congresses-final-july-2025.pdf

- **Exhibition Stands** are areas in the context of an International Congress where pharmaceutical companies (and other organizations) can display their product material to delegates in the commercial booth and their scientific material in the medical exhibition area.

- **Healthcare Professional (HCP)** means any member of the medical, dental, pharmacy, or nursing professions or any other person who in the course of his or her professional activities may prescribe, recommend, purchase, supply, sell, or administer a pharmaceutical product.

- **Hybrid International (Medical) Congress** means an International Congress that has virtual/digital activities as well as in-person elements at one or multiple locations. For the purpose of this guidance, the in-person portion of the congress should always have registered attendees.

- **International (Medical) Congress** means a scientific meeting organized by a medical association/society etc. for their members with the opportunity for industry to participate in the form of exhibition (medical and commercial), satellite symposia etc. The medical association/society is the owner of the congress and is responsible for attendee management, access, and other relevant criteria, e.g. the scientific agenda. The congress gathers a multinational group of medical experts and professionals with the objective to increase the
knowledge about and expertise in disease state and treatment, to facilitate exchange and ultimately to

advance patient care. The delegates usually comprise of HCPs, researchers, and other individuals who work in the healthcare and/or research environment.

- **Virtual International (Medical) Congress** is an International Congress where all activities are virtual/digital without an in-person event linked to it. Companies have the opportunity to participate in the form of virtual exhibition stands as well as virtual satellite symposia.

- **Satellite symposium** is a company-owned activity which occurs immediately prior, during or immediately after the main scientific program in the context of an International Congress and which is not part of the core scientific program.