

ADDICTION AT ANY COST

Philip Morris International Uncovered



STOPPING TOBACCO
ORGANIZATIONS & PRODUCTS

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Executive Summary

What is this report about?

In January 2018, Philip Morris International (PMI) announced its goal “to give up cigarettes” and create a “smoke-free future.” It said it would end the sale of combustible cigarettes entirely, and instead offer smokers alternatives, notably heated tobacco products (HTPs) that PMI claims are less harmful than smoking. PMI subsequently launched a comprehensive global PR campaign, seeking conversations with regulators to enable HTPs to be introduced into key markets, and trying to persuade stakeholders that the company is now the solution to the tobacco epidemic.

Yet the tobacco industry’s long history of denial and disingenuity - as a means of selling as many of its deadly tobacco products as possible - raises questions over whether this smoke-free “transformation” is legitimate. Are they genuinely stopping selling cigarettes? Should governments trust them? Have they transformed?

To shed light on these vital questions, this report analyzes historical tobacco industry documents, industry sales data, and findings from tobacco industry monitoring undertaken by the University of Bath, a partner in global tobacco industry watchdog STOP (Stopping Tobacco Products and Organizations) and collaborators.

What did we do and what did we find?

In **Chapter 1**, we examine chronologically the tobacco industry's attempts to develop and market "safer" tobacco products, and its motivations for doing so. We conclude that the tobacco industry has never been genuinely interested in reducing harm. Instead it has repeatedly invested in and developed new 'safer' products as a response to the threat of decreasing cigarette sales – in other words, to prevent smokers from quitting entirely and to attract new users. Despite this being the real motive, industry leaders launched products accompanied by claims the industry was committed to harm reduction, and tobacco companies used "safer" products to rehabilitate their tarnished reputation, weaken tobacco control and attempt to divide the public health community. The rest of the report shows how these tactics are being repeated.

Chapter 2 builds on **Chapter 1** and uses recent industry data to further understand the context in which the major tobacco companies introduced HTPs. We report that the tobacco industry launched HTPs at a time when its ability to continue to profit long-term from cigarettes and other combustible products was seriously challenged. Given the particular importance of HTPs to PMI (it has just a 0.3% share in the global e-cigarette market but is the market leader in HTPs), we focus on PMI and its HTP brand IQOS. We find that PMI has primarily launched IQOS in higher income countries, where cigarette sales are already falling. This suggests the company's priority is boosting sales and profit in stagnating markets, rather than genuine harm reduction.

Together the evidence from **Chapters 1 and 2** suggests novel nicotine products are increasing the pool of nicotine consumers, rather than acting as alternatives to the combustible cigarette.

In **Chapter 3**, we compare PMI's public statements about going "smoke-free" to its private strategies and marketing activ-

ities. We present evidence that PMI's "smoke-free" rhetoric is a calculated corporate affairs strategy to renormalize their company brand. We show that instead of supporting public health goals, PMI continues to contest and challenge evidence-based tobacco control measures, heavily market cigarettes, introduce new cigarette brands and acquire new cigarette companies. We also report recent examples of PMI's youth-oriented marketing, both of IQOS and their combustible cigarettes, and argue that their IQOS social media promotion breaches their own marketing standards. In short, we lay bare the false logic in PMI's "smoke-free" narrative.

Chapters 4 and 5 focus on the PMI-funded Foundation for a Smoke-Free World. We consider the Foundation's claims of independence and show it is instead wholly dependent on PMI, apparently coordinates work with PMI, and hires agencies with long-standing tobacco industry links. We examine its claimed focus on science and show that the amount spent by the Foundation on science thus far has been less than that spent on public relations. This and its other activities suggest the Foundation is effectively operating as a public relations and lobbying arm of PMI. We explore its so-called support for tobacco control and show how its staff and those it funds have pushed against evidence-based tobacco control measures. Finally, we show that PMI has a history of creating similar organizations to show its cigarettes were safe. Robust science certainly is needed on HTPs, but history and the Foundation's conduct to date suggest that neither the Foundation nor its grantees should be the ones making this scientific contribution. **Chapter 5** presents evidence which might alarm PMI's shareholders - that, despite pledging nearly a billion U.S. dollars over 12 years, the venture may be failing.

What does this all mean?

PMI's claim that it wants "to give up cigarettes" and create a "smoke-free future" are illogical, highly disingenuous and dangerous for public health.

PMI has not transformed. Delivering on its claims would put it out of business:

- PMI has not stopped selling cigarettes. Instead it continues to make extensive efforts to drive up smoking where there is still scope to do so.
- Where its ability to drive up cigarette sales and profits is now limited, it is launching-or trying to launch-HTPs, creating a new epidemic.
- PMI is not supporting effective evidence-based tobacco control measures. Instead it continues to actively oppose them.

PMI's claims are a massive PR exercise intended to enable it to access the policy circles from which it had been excluded, and to design future policies in its own interests.

The Foundation for a Smoke-Free World is a PMI front group created to assist PMI in these efforts. PMI and the Foundation cannot and should not be trusted, and we must remain highly skeptical of their scientific claims, and of studies they fund.

Whatever position countries wish to take on harm reduction, the tobacco industry and its front groups such as the Foundation for a Smoke-Free World should play no role in policymaking.

What this report does not do

This report does not intend, and nor should it be used, to examine evidence for or against the role of harm reduction approaches including e-cigarettes as part of comprehensive tobacco control policies.



Glossary of Terms

ASH	Action on Smoking and Health <i>ASH is a tobacco control charity with autonomous chapters in a range of countries, including the U.S. and U.K.</i>	PMI	Philip Morris International <i>PMI is the largest transnational tobacco corporation in the world (excluding the Chinese National Tobacco Corporation). It separated in 2008 from Philip Morris USA. Its headquarters are in Geneva and it produces brands such as Marlboro and IQOS.</i>
BAT	British American Tobacco <i>BAT is the second largest transnational tobacco company after PMI, headquartered in London. It produces brands such as Lucky Strike.</i>	RJR	RJ Reynolds <i>RJR is the second largest tobacco company in the U.S. after Philip Morris USA.</i>
CoEHAR	Center of Excellence for the Acceleration of Harm Reduction <i>FSFW-funded harm reduction research center in Catania, Italy.</i>	RYO	Roll-your-own tobacco <i>As opposed to manufactured cigarettes, RYO cigarettes are constructed by consumers from loose tobacco and rolling paper for use with or without filters.</i>
COP	Conference of the Parties (to the WHO FCTC) <i>Meeting of the signatories of the WHO FCTC ("parties"), which takes place once every two years.</i>	SLT	Smokeless tobacco <i>Tobacco consumed without combustion either orally or nasally, by sniffing, chewing, or sucking. SLT is addictive and delivers nicotine, though generally considered less hazardous than smoking.</i>
COREISS	Centre of Research Excellence: Indigenous Sovereignty & Smoking <i>FSFW-funded harm reduction research center in New Zealand.</i>	TIRC	Tobacco Industry Research Committee <i>Scientific organization set up by PMI and others to create doubt about the harms of smoking.</i>
CSUR	Centre for Substance Use Research <i>Research center in Glasgow, Scotland that has received funding from transnational tobacco companies including PMI, e-cigarette manufacturers and FSFW.</i>	TTC	Transnational Tobacco Company <i>TTCs are tobacco corporations that operate across multiple countries.</i>
E-CIGARETTES	Electronic cigarettes <i>E-cigarettes turn nicotine liquid into an aerosol for the purpose of inhalation. They vary in the amount of nicotine they deliver, but do not contain tobacco. It is generally agreed that they are likely to be less harmful than combustible tobacco, however they are not harmless and the long-term health impacts are not yet fully understood.</i>	WHO FCTC	World Health Organization Framework Convention on Tobacco Control <i>In force since 2005, the WHO FCTC is an international treaty aimed at reducing the demand and supply of tobacco. The treaty includes Article 5.3 which obliges parties to protect policies from tobacco industry interference.</i>
ECLT	Eliminating Child Labour in Tobacco Growing Foundation <i>Foundation which states its remit is to tackle child labor in tobacco growing. ECLT is supported by PMI.</i>		
ENDS	Electronic Nicotine Delivery Systems <i>ENDS is a different term for e-cigarettes and for simplicity we use the term e-cigarettes.</i>		
EU TPD	European Union Tobacco Products Directive <i>The TPD was introduced in 2014 to regulate the manufacture, presentation and sale of tobacco products in the EU. It replaced the earlier 2001 E.U. TPD.</i>		
FDA	The United States Food and Drug Administration <i>The FDA, a federal agency of the U.S. Department of Health and Human Services, is responsible for regulating tobacco and other nicotine products.</i>		
Forest	Freedom Organization for the Right to Enjoy Smoking Tobacco <i>Forest is a U.K.-based smokers' rights group which has historically received most of its funding from major tobacco companies.</i>		
FSFW	Foundation for a Smoke-Free World <i>FSFW is a PMI-funded foundation launched in 2017, ostensibly to "accelerate an end to smoking." Its claims of independence have been strongly contested within the public health community. We refer to this organization as "the Foundation" throughout this report.</i>		
HTPs	Heated Tobacco Products <i>HTPs are devices that heat tobacco at a lower temperature than conventional cigarettes. While tobacco companies claim that this is linked to substantially lower health risks, this has yet to be verified by independent evidence.</i>		
JTI	Japan Tobacco International <i>Transnational tobacco company with headquarters in Geneva. JTI produces cigarette brands such as Winston.</i>		
MRC	Medical Research Council <i>As one of the U.K. government's research councils, the MRC coordinates and funds medical research.</i>		
NCI	National Cancer Institute <i>Part of the U.S. National Institutes of Health, the NCI funds and coordinates cancer research.</i>		
NGPs	Next Generation Products <i>Denoting the "next generation" of products after conventional cigarettes, NGPs most often take the form of e-cigarettes or heated tobacco products.</i>		



1 *The Tobacco Industry and Harm Reduction: A History of Deception*

Key Messages

History shows that the tobacco industry has repeatedly launched new products and claimed a commitment to harm reduction, but each time this has been a tactical response to threat rather than a genuine commitment to reducing harm.

Evidence suggests tobacco industry investments in novel products have never been driven by concerns about health but are instead profit driven, triggered by threats to cigarette sales resulting from both tobacco control policies and competitor products.

Novel products have been repeatedly used to stem and reverse declines in cigarette sales.

Industry documents indicate a desire to use novel nicotine products to “make new profits rather than cannibalise existing profits from cigarettes” by creating a new form of tobacco use among those no longer wishing to smoke. In other words, to create a new epidemic and attract new users who would not otherwise take up smoking.

The tobacco industry also strategically uses these investments to rehabilitate its image, to split the public health community and weaken effective tobacco control.

For decades tobacco companies have claimed they are committed to reducing the harm caused by their deadly but extraordinarily profitable product, the cigarette. These claims have been made in response to the repeated threats to their business. Each time they are accompanied by campaigns promoting new products as delivering on this claim - historically filter-tipped and “light” cigarettes, then smokeless tobacco, and more recently electronic nicotine delivery systems (ENDS, for simplicity referred to throughout as e-cigarettes) and heated tobacco products (HTPs) (see Timeline) (11-13).

However, the tobacco companies’ own internal documents reveal that they have never been genuinely interested in reducing harm. Rather, the launch of these products was driven by a desire to increase profits and prevent reductions in sales (14-16).

This chapter outlines this history and explains how tobacco companies have used these products and the public relations campaigns accompanying them in its attempts to turn business threats into opportunities and wins:

Win 1
Rehabilitate the tobacco industry’s tarnished image
 and position it as part of the solution rather than the problem, helping it re-establish access to political elites to secure policy influence.

Win 2:
Give impression of divided public health community

Win 3:
Weaken tobacco control,
 for example by promoting harm reduction approaches over established population level policies.

Win 4:
Provide a pathway to profit
 and future growth by maintaining nicotine addiction, preventing quitting, recruiting new users, and eliminating competition.

It then briefly shows how history is repeating itself with the advent of e-cigarettes and heated tobacco products (HTPs).

1.1 How Tobacco Companies (Mis)use Tobacco Harm Reduction Claims

1.1.1 1950s-1970s: Filter-tipped and “light” cigarettes

From the 1950s, increased public awareness of a causal link between smoking and lung cancer (17, 18) prompted governments to start regulating cigarettes. Tobacco companies knew they needed to act to prevent millions of concerned smokers from quitting (Box 1). To combat this and to prevent governments from regulating tobacco products, tobacco companies introduced increasingly sophisticated cigarette filters, followed by so-called “light” cigarettes, which allegedly delivered less toxins to smokers. Both products were marketed with implied promises of reduced risk to health and positioned as alternatives to quitting (Figure 1.1) (12, 19, 20).

These claims, while widely believed by the public, were not backed up by science (23). Evidence shows that while filters make smoke inhalation feel milder on the throat, they enable smokers to take deeper puffs (24). Similarly, “light” cigarettes are commonly smoked more intensely than regular cigarettes to “compensate” for the level of nicotine consumed, in effect making the smoker receive the same, if not higher, amounts of

tar and toxins deeper into the lungs (25). In the words of a tobacco industry scientist back in 1979: “*The effect of switching to low-tar cigarettes may be to increase not decrease the risks of smoking*” (26). Tobacco companies continued to muddy the water on their health impacts through poor science (see Chapter 4 for more detail), for example by using machine tests for nicotine, tar, and carbon monoxide, which systematically underestimated their yields by as much as 80% (27). Furthermore, from the 1970s onward, tobacco companies were manipulating nicotine dosing in cigarettes in order to maximize their addictive potential and make it harder for smokers to quit (28).

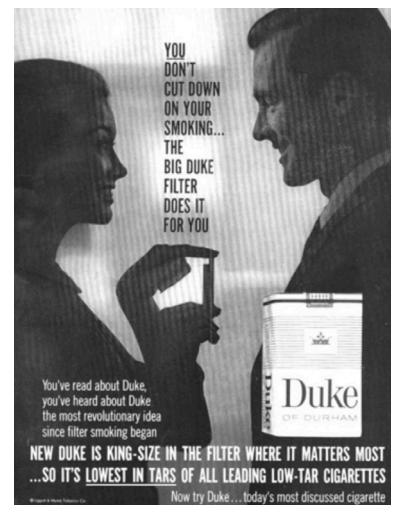


Figure 1.1: 1976 ad for True cigarettes and 1960 ad for Duke cigarettes [Sources: (12, 22)].

Box 1: Tobacco industry on "light" cigarettes (21)

"All work in this area should be directed towards providing consumer reassurance about cigarettes and the smoking habit. This can be provided in different ways, e.g. by claiming low deliveries, and by the perception of 'mildness.' " (2)

–British American Tobacco Co., 1977

"Quitters may be discouraged from quitting, or at least kept in the market longer... A less irritating cigarette is one route (indeed, the practice of switching to lower tar cigarettes and sometimes menthol in the quitting process tacitly recognizes this). The safe cigarette would have wide appeal, limited mainly by the social pressures to quit." (10)

– Report for Imperial Tobacco Limited, 1986

How the tobacco companies benefited

Rehabilitated their image

Tobacco companies used these products to present themselves as committed to developing a less harmful product. Meanwhile, their internal documents indicate that they were deliberately misleading consumers, making implicit health claims about products that offered no such benefits (29, 30).

Gave impression of divided public health community

Tobacco companies contributed money to the Medical Research Council in the U.K. and the National Cancer Institute in the U.S. to develop research programs aimed at removing the harmful components of cigarettes. Some public health experts and organizations became willing partners of tobacco companies, optimistic about the harm reduction potential of the new "improved" cigarettes (12, 31-33). Researchers who did not trust tobacco company claims were sometimes marginalized (19, 34).

Weakened tobacco control

Convinced by the tobacco industry's claims of reducing risk, some governments in countries with the highest smoking rates, such as the U.S., held off from regulating tobacco products. We now know that by the 1970s, tobacco companies were aware that their new products did not offer health benefits, yet they did not share this information (30, 35, 36). Therefore, public health advice to smokers often was to switch to "light" alternatives if they could not quit altogether. The 1981 U.S. surgeon general's report advised "smokers who are unwilling or as yet unable to quit ... to switch to cigarettes yielding less 'tar' and nicotine" (37).

Provided a pathway to profit

Internal tobacco industry documents reveal that "safer" cigarettes were introduced to prevent concerned smokers from quitting (21). They proved a resounding commercial success. Sales of filtered cigarettes increased exponentially from 10% of the U.S. cigarette market in 1954 to 90% in the mid-1970s, and smoking among women increased between the 1950s and 1970s (19).

1.1.2

1970s-2000s: Portioned smokeless tobacco and snus

From the 1970s, the likelihood of further regulation, and the fact that the young and health-conscious were no longer taking up smoking in numbers as large as in previous years, began to threaten cigarette sales once more. Some cigarette companies explored opportunities in “portioned smokeless tobacco.” Whereas conventional smokeless tobacco had been a niche product, this type of smokeless tobacco was portioned to make it easier to consume and more appealing to a mass market.

Although tobacco industry scientists concluded that smokeless tobacco was “probably” less hazardous than smoking (38), it was the desire to generate new profits, rather than a commitment to harm reduction, that underpinned the industry’s interest (14). Cigarette companies saw the product’s potential to “*make new profits rather than cannibalise existing profits from cigarettes*” (39) by creating a new form of tobacco use among those no longer willing to smoke (14). Young people and nonsmokers were to be a key target (14).

Ultimately, despite recognizing some 30 years earlier that smokeless tobacco was less harmful than smoking, large tobacco companies did not invest in

smokeless tobacco until 2002. From this point they made a flurry of investments in snus, a lower-risk, portioned form of smokeless tobacco produced and widely used in Sweden (41). By 2009, most independent snus companies had been bought out.

The context is important - this was a time of growing regulatory and reputational threat (see timeline). Tobacco companies were particularly concerned about smoke-free policies driving declines in cigarette sales (smokeless tobacco could of course be used indoors) (14). Litigation in the U.S. had seriously damaged the tobacco industry’s reputation, ending its “insider” status with governments (42). The WHO FCTC had been adopted. Its Article 5.3, which outlined the need to protect health policies from the vested interests of the tobacco industry, cemented the industry’s pariah status (43). The ultimate trigger, however, was the public health interest in the potential for harm reduction via snus, based on the “Swedish Experience” (Box 2). Buying up snus companies would thus offer reputational gain while simultaneously eliminating competition from independent snus manufacturers.

We have no wish to aid or hasten any decline in cigarette smoking. Deeper involvement in smokeless is strategically defensible. There are fewer people in sophisticated markets starting to smoke. There are increasing numbers of people giving up. There are increasing restrictions on smoking, particularly in public, whether by law or by society. There is a smaller population of smokers who are smoking more. The trend towards cigarette products being lower in deliveries, which certainly in America was manufacturer-led, may move more people out of smoking in the longer term. Smokeless tobacco products might well provide an acceptable alternative to those consumers who would otherwise quit, and to those who could use smokeless at times when they cannot smoke.

Figure 1.2: 1981 BAT internal briefing on smokeless opportunities [Source: (40)].

Box 2: The Swedish Experience

Swedish men have one of the lowest daily smoking rates in Europe (1), and one of the lowest rates of tobacco-related disease (including lung cancer and cardiovascular disease) globally (3). Many in public health believe that the high male snus consumption accounts for the reductions in Swedish male smoking, proposing that this proof of concept could be replicated elsewhere in the EU and achieve net health gains (4-6). Others (7-9), many from Scandinavia, have criticized this interpretation of Swedish data, countering that strong Swedish tobacco control measures instead played a significant role in reducing male smoking prevalence.



They highlight that Swedish data show that only 5% of Swedish male smokers quit smoking using snus, that four out of 10 male snus users started their tobacco use with snus, and that almost as many continue to smoke and are dual users. Furthermore, they argue that smoking prevalence among Swedish women has also significantly declined in the past 20 years (from 29% to 14%), albeit with no significant uptake in snus, thus indicating that snus is not associated with this decline.

How the tobacco companies benefited

Rehabilitated their image.

The tobacco industry was quick to recognize the PR opportunities of snus investments and identified harm reduction as a “reputation management initiative” (Figure 1.3) (44). They rapidly appropriated the term “harm reduction” from the public health community, using it profusely in their public-facing material to claim a joint agenda with public health (15).

Gave impression of divided public health community.

Differing interpretations of the “Swedish Experience” led the public health community to widely debate the potential harm reduction benefits of snus. Concerns focused on the population impacts, including tobacco companies’ extending their cigarette branding to snus and promoting dual use. As far back as 1995, Philip Morris outlined its desire to create fractures in the public health community. Via a campaign called “Project Sunrise” the tobacco company aimed “to divide and conquer the tobacco control movement by forming relationships with what it considered ‘moderate’ tobacco control individuals and organizations” (46).

Weakened tobacco control.

Tobacco companies labeled snus products with cigarette brands, promoted use of smokeless tobacco in smoke-free places and targeted young nonsmokers (47). The sharp rise in young people consuming snus in Norway was attributed to its many flavors and packaging appealing to youth (48). Tobacco companies used harm reduction claims to present themselves as partners rather than adversaries and to secure policy influence (15, 42, 49, 50). They lobbied to overturn the European ban on snus sales, and detracted from tobacco control measures of known effectiveness, like plain packaging.

Provided a pathway to profit.

By buying up most snus manufacturers, the major cigarette companies turned snus from a threat - a product that could cannibalize their cigarette sales - to an opportunity, a product that could provide them with a long-term source of profit and investor confidence should the cigarette market prove unsustainable. The industry promoted dual use of cigarettes and snus, and developed a snus marketing campaign targeted at young non-tobacco users, which added to concerns that snus use may lead to, rather than from, smoking (14, 47).

The key question then is "How can we enhance our business and our reputation at the same time?"

Figure 1.3: BAT presentation by Adrian Marshall [Source: (45)]

1.1.3

2010 to present: E-cigarettes

As the new millennium progressed, the social acceptability of smoking fell further, and in many countries smoking disappeared from indoor public venues and shared outdoor spaces (51). Global smoking prevalence declined (52). The industry's ability to increase cigarette prices to maintain profits came under threat with the introduction of plain tobacco packaging policy in many countries and tobacco tax increases across the world (Chapter 2). Finally, a host of technologically sophisticated nicotine delivery products emerged, challenging both the dominance of the conventional cigarette and, initially at least, the major tobacco companies.

Initially exported from China starting in 2005 (see timeline), e-cigarettes were marketed as a significantly less harmful way to consume nicotine. Although uncertainty about the short and long-term health impacts remains, current evidence suggests using e-cigarettes is likely to be safer than smoking, providing smokers are able to transition fully to e-cigarettes or use e-cigarettes to quit entirely (53-55). However, their overall impact at population level remains unclear and

widely debated, not least because it may vary with the regulatory context (54). Of particular concern is the potential for youth uptake of e-cigarettes as witnessed in the U.S., where nearly 21% of high schoolers vaped in 2018 (56) (an increase of 78% over the previous year), and studies suggest that young people who vape are more likely to become smokers (54, 57). Youth smoking rates in the U.S. have nevertheless declined since 2011, although there was a slight increase among high, but not middle-school, students in 2018 (56).

The irony, given the way the company is currently espousing harm reduction, is that Philip Morris's research and development and operations documents from the 1990s show that the company's research on alternative nicotine delivery systems was originally driven by the fear of regulation such as smoke-free public places and genuine harm reduction – smokers giving up or switching to pharmaceutical nicotine. Further, that research was ultimately abandoned because of Philip Morris's concerns that it would trigger regulation of conventional cigarettes, stating, "It was not in our business interests to continue" (16).

Nonetheless, by 2013 the global e-cigarette market, driven by independent producers, was worth US\$3 billion (58). The major tobacco companies decided to act and did so decisively (59). From 2012 they attempted to stifle competition, rapidly acquiring independent manufacturers and launching their own e-cigarette brands, accompanied by well-funded promotional campaigns emphasizing the harm reduction potential of their new products (58-61). In December 2018, the U.S. tobacco giant Altria - parent company of Philip Morris USA - bought a 35% stake in Juul, probably the most successful independent e-cigarette producer to date (Box 3), thereby reducing one more threat to its bottom line (62).

Box 3: Juul and Altria (61, 62)

In 2017, an e-cigarette called Juul, shaped in the form of a USB stick and with an exceptionally high nicotine content (59mg/ml), took the U.S. by storm. Within 12 months Juul secured market leadership, capturing 70% of the U.S. e-cigarette market by July 2018. The company supplying the e-cigarette, Juul Labs, came under fire for aggressively marketing to teenagers while pitching the device as a smoking cessation aid without any evidence of its success in helping people quit. The U.S. Food and Drug Administration (FDA) blamed Juul for creating a youth vaping "epidemic" and started formal investigations into the company's marketing practices in April 2018.

Later that year, tobacco giant Altria bought 35% of Juul Labs shares, a move widely condemned by the public health community and authorities. A letter signed by 11 U.S. senators says: "The corporate marriage between two companies that have been the most prolific at marketing highly addictive nicotine products to children is alarming from a public health standpoint and demonstrated, yet again, that Juul is more interested in padding its profit margins than protection our nation's children" (65).

How the tobacco companies benefited

Rehabilitated their image.

New product launches have been accompanied by the industry’s usual narrative around its commitment to reducing harm. This approach has enjoyed some success. After decades of pariah status, industry representatives began once again to share platforms with public health experts in discussions about harm reduction. Will Hill, the PR manager for British American Tobacco (BAT), remarked in 2015, *“Imagine that happening 10 years ago. We’re now starting to share podiums with people like ASH [Action on Smoking and Health] at e-cigarette conferences”* (66).

Gave impression of divided public health community.

Given the lack of good-quality long-term health outcome data, the complexity of research in this area, and apparently differing outcomes in different jurisdictions, the public health field has not yet agreed on the population harm reduction potential of e-cigarettes. PMI’s latest leaked documents, building on the company’s previous Project Sunrise initiative, reveal the company has sought to “amplify the voices of harm reduction supporters,” in particular “those that cannot be ignored” (67, 68). Nevertheless, most people working in tobacco control agree that the tobacco industry and its science cannot be trusted.



Figure 1.4: Blu Electronic Cigarettes ad, 2013 [Source: (71)]

Weakened tobacco control.

Tobacco companies have used e-cigarettes to undermine existing policies such as advertising bans and smoke-free public places by taking advantage of the fact that most tobacco control legislation does not cover the marketing, sale, or use of novel products (Figure 1.4) (69). This enables them to produce e-cigarette advertisements mirroring old cigarette ads, once again putting “cigarettes” on billboards and screens (Figures 1.5 and 1.6). E-cigarettes are deliberately being promoted for use in places where smoking is not allowed. The industry has also increasingly used social media and influencers, often targeting children, to promote its new products, as evidenced by the advertising of Juul (Figure 1.7) (70).

Lobbying via vaping associations and tobacco company subsidiaries making e-cigarettes and alternative tobacco products has also enabled tobacco companies to reclaim a seat at the regulatory table. A recent U.K. committee inquiry on e-cigarettes, which concluded that the government should further embrace e-cigarettes as a smoking cessation measure and explore opportunities post-Brexit to deregulate e-cigarettes and snus, had significant tobacco industry input by proxy (76).

Pathway for future growth.

As early as the 1970s, when scoping the opportunities offered by smokeless tobacco, the tobacco industry realized that in order for harm reduction products to work as a sustainable business strategy, they needed to have the potential to create new users (14). Tobacco companies are now reporting to investors that the total nicotine market has begun to grow again after decades of decline. Alison Cooper, the former chief executive officer of Imperial Tobacco (which by October 2019 had invested heavily in e-cigarettes but not HTPs), (77) noted:

“So it’s not a question of shifting to NGP [next generation products], then that comes straight out of combustible tobacco consumption because we are seeing nicotine market growth in the U.K., for example. And therefore not only an additive opportunity for Imperial, but has an additive opportunity there full stop as well” (78).



Figure 1.5: 1959 L&M cigarettes ad and 2013 Blu Electronic Cigarettes advertisement [Sources: (72, 73)]



Figure 1.6: NJoy Electronic Cigarettes advertisement, 2013 [Source: (74)]

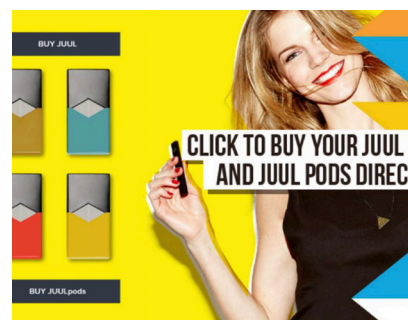


Figure 1.7: Juul pods advertisement, 2015 [Source: (75)]

Table 1. Comparison of how the tobacco industry benefited from its harm reduction products

	1950s to 1970s: filters and “light cigarettes”	1980s to 2000s: portioned smokeless tobacco and snus	2000s to present: e-cigarettes
Win 1: Rehabilitated its image	Presented itself as committed to developing “less harmful” products, while simultaneously deliberately misleading consumers with unfounded claims of harm reduction.	Product first considered a “reputation management initiative” by the industry. Later it became an opportunity to claim a shared agenda with public health.	The industry portrayed itself as committed to reducing harm by offering smokers alternatives and becoming part of the solution.
Win 2: Gave impression of divided public health community	Many governments and public health organizations partnered with tobacco companies (e.g. Medical Research Council in the U.K., National Cancer Institute in the U.S.).	Promoted polarization of community over snus and whether it should be promoted as a less harmful alternative and be made available to smokers in markets where its sale was banned.	Deep polarization of community over e-cigarettes. However, the tobacco control community remains consistent that the tobacco industry should not be allowed to influence policy debates on harm reduction.
Win 3: Weaken and delay tobacco control	Convinced by the tobacco industry’s commitment to harm reduction, governments in countries with the highest smoking rates, such as the U.S., held off from regulating tobacco products.	Tobacco companies promoted snus use in smoke-free places and have repeatedly tried to lift and legally challenge the European ban on snus.	Industry used e-cigarettes to circumvent advertising bans, promote harm reduction over established tobacco control measures. Via vaping associations, it reclaimed a seat at the regulatory table in some countries.
Win 4: Pathway to profit	Filtered and “light” cigarettes were a resounding commercial success, and tobacco companies manipulated nicotine dosing in order to make it harder for smokers to quit.	Unlike cigarettes, snus had volume growth potential. To retain investor confidence in its sustainability, it’s crucial for tobacco companies to have such products in its portfolio.	By offering alternatives such as e-cigarettes, tobacco companies can maintain customers who might otherwise quit altogether.

Box 4: E-cigarette Market Share

In 2018, according to Euromonitor, just over half of the global e-cigarette market (55%) was divided among approximately 57 companies. Euromonitor attributed just under half of the e-cigarette market to “other” companies (45%), illustrating the diverse nature of the e-cigarette market (79).

Nine of the 57 companies listed by Euromonitor are owned or part owned by tobacco companies (79). Juul

Labs, owning 19% of the global e-cigarette market, is Euromonitor’s market leader among the 57 companies. A tobacco company (Altria) bought a 35% stake in Juul Labs in December 2018 (64). However, Euromonitor data suggest that only 0.3% of the global e-cigarette market is held by PMI directly, and PMI does not own any of the other 56 companies listed (although it does own some companies not included in Euromonitor’s list) (80).



Figure 1.8: IQOS advertisement, undated [Source: (82)]

1.2 Heated Tobacco Products

Despite substantial investment in e-cigarettes, the major tobacco companies’ market share in the e-cigarette market remains relatively small, and e-cigarettes therefore remain a potential threat to their core business (Box 4).

Perhaps in light of this, tobacco companies have been actively investing in other next generation products (NGPs) alongside e-cigarettes, most notably heated tobacco products (HTPs) – electronic devices that heat tobacco sticks to the point of thermal decomposition and produce a vapor – as well as new forms of smokeless tobacco. HTPs have been at the center of their marketing offensive (Figure 1.8) and further claims of harm reduction (81).

Emerging evidence suggests that, like e-cigarettes, these new products are also enabling the major tobacco companies’ to increase total sales, which were previously declining. For example, a 2018 presentation to investment analysts from BAT (which has invested in both e-cigarettes and HTPs) notes an expansion in the total number of nicotine users – an increase of 8 million consumers across its top 40 markets (excluding the U.S.; see Figure 1.9).



Figure 1.9: Slide from BAT Analyst Briefing, 2018 [Source: (83)]

By March 2019, BAT was even more buoyant – its presentation to investors making clear that the growth in nicotine consumers had now reached 61 million across these 40 markets, generating rapidly increasing profits (84).

Worryingly, the presentation makes clear that that poly-usage is the norm and that a significant portion of the growth is driven by new users (“entrants” in BAT’s language), although this varies by product category, being highest for e-cigarettes and lowest for HTPs.

The presentation also indicates that the importance of these products to the industry is that they are even more profitable than cigarettes. BAT reports that heated and oral tobacco products both enjoy margins approximately 2-3 times greater than cigarettes (already known to be extraordinarily profitable) (85).

This presentation provides data on just one major tobacco company. Chapter 2 explores the global context in more detail.

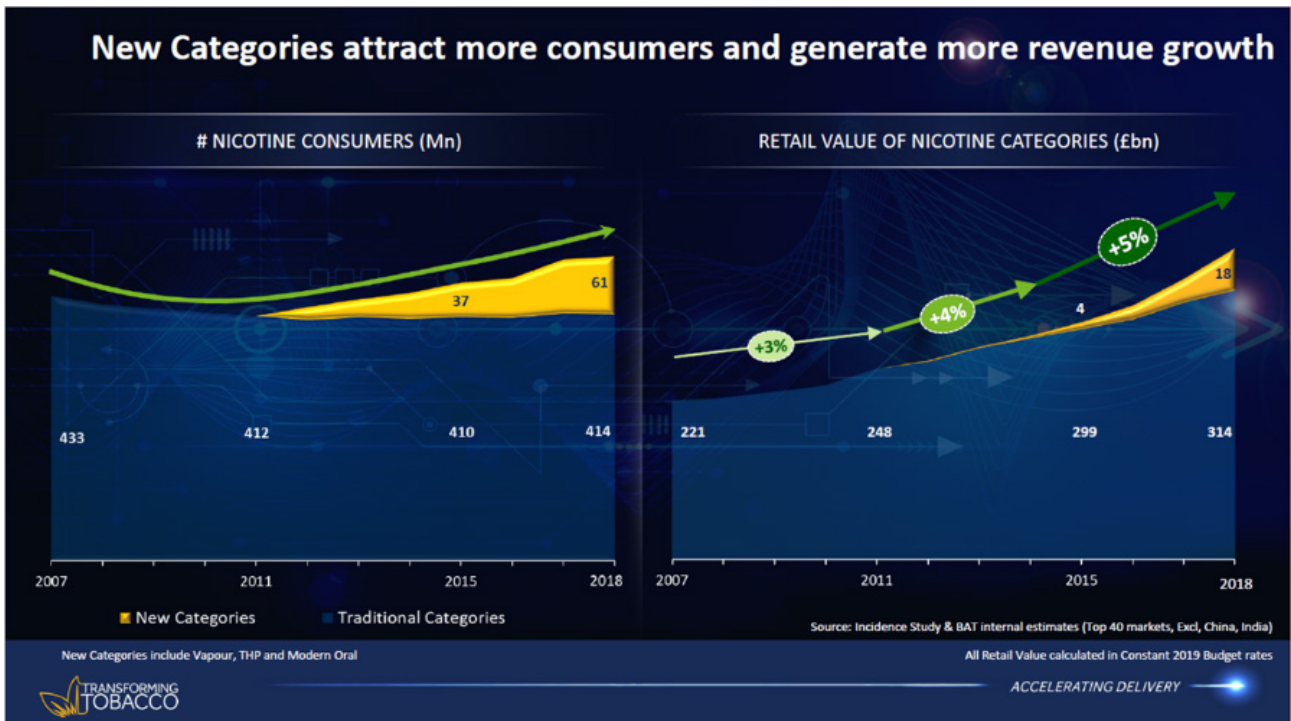


Figure 1.10: Slide from BAT analyst briefing, 2019 [Source: (84)]

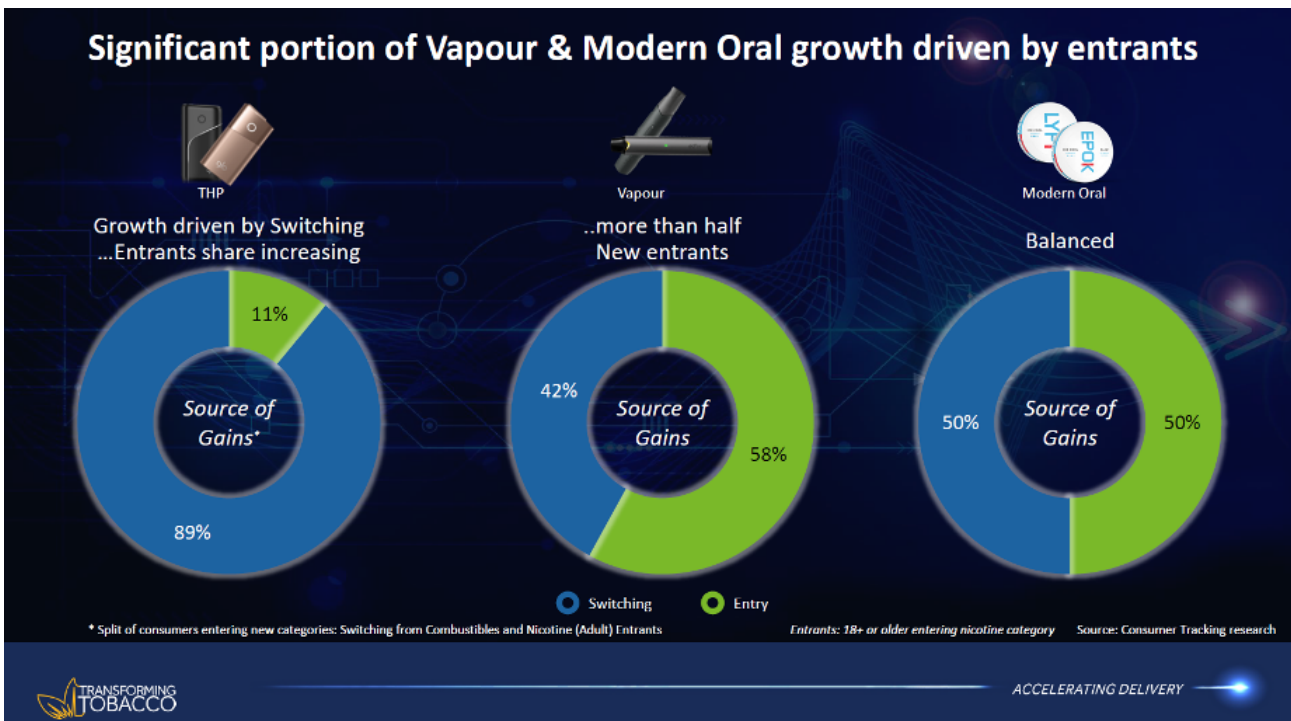


Figure 1.11: Slide from BAT Analyst Briefing, 2019 [Source: (84)]

Activity Timeline

[1950-1999]

Doll & Hill and Wynder & Graham studies published	1950
Launch of the Tobacco Industry Research Committee Led by prominent biologist Clarence Cook Little, TIRC promises to provide "aid and assistance to the research effort into all phases of tobacco use and health."	1953
BAT Project Mad Hatter concludes that smokers are drawn to cigarettes due to nicotine	1962
U.S. surgeon general's report on smoking and health	1964
BAT terminates Project Ariel First attempt at creating commercial product vaporizing nicotine without burning it—canceled due to "lack of commercial viability."	1969
Philip Morris launches flavored, low-tar Merit cigarettes	1976
BAT Memo "Efforts should not be spent on designing a cigarette which [...] denied the smoker the opportunity to compensate or oversmoke [...]."	1981
RJR marketing analysis Smoker of low-tar "wants nothing less than to be conned with information".	1986
RJR launches HTP Premier	1988
Philip Morris initiates Project Sunrise Project Sunrise intended to ensure social acceptability of smoking by forming relationships with "moderate" tobacco control individuals/organizations and ostracizing "prohibitionists."	1995
RJR launches HTP Eclipse	1996
Philip Morris launches HTP Accord	1997

Menthol cigarettes popularized

Menthol cigarettes capitalized on the common associations with cough and cold remedies.

Filtered cigarettes popularized

Addison Yeaman, VP of Brown & Williamson tobacco: "Here is our triple, or quadruple filter, capable of removing whatever constituent of smoke is currently suspect while delivering full flavor—and incidentally a nice jolt of nicotine" (1963).



Low-tar ("light") cigarettes popularized

RJR R&D declares its top priority is to "develop and market low tar brands that: Maximize the physiological satisfaction per puff" (1976).



Repeated failures to develop commercially successful heated tobacco product

Philip Morris concerned that nicotine replacement therapy (NRT) poses "a dual threat they make it easier for smokers to quit, and smokers who quit are the major cause of loss of sales of our products" (1992).



[2000-2019]



Average yield of nicotine per cigarette rises by 14.5% in MA, U.S.A.



Cigalike



Vape Pen

Revenues from sales of ENDS double every year

Spending on ENDS promotion rises from £1.7 million to £13.1 million



Box Mod

Number of adult vapers globally increases from 7 million to over 40 million



Vape Pod



IQOS



2 *Global Tobacco and Next Generation Product Market, and Philip Morris International*

Key Messages

The tobacco industry launched HTPs at a time when their ability to continue to profit long-term from cigarettes and other combustible products was seriously challenged.

Together the evidence from Chapters 1 and 2 suggest novel noncombustible nicotine products act largely as additives rather than alternatives to the cigarette.

PMI has targeted IQOS at markets where cigarette sales were already falling and where regulation is greater, not those where cigarette use is rising and where there is greater potential for genuinely reducing harm. This raises further doubts over the credibility of PMI's "goal" of curtailing the smoking epidemic.

PMI is pricing IQOS heat sticks at similar levels to (on average one cent cheaper than) Marlboro cigarettes, one of PMI's most expensive cigarette brands, despite IQOS generally being subject to much lower tax rates. PMI's greater profit margin on heat sticks suggests it could afford to provide a greater price incentive to smokers.

The growth in next generation products, notably e-cigarettes and HTPs, has been sufficient not just to offset, but also reverse the decline in value in combustible tobacco sales. The value of the global tobacco and next generation product market is once again increasing. However, novel products account for an extremely small share of the overall tobacco and nicotine market, which remains dominated by combustible cigarettes.

Chapter 1 shows that each time the major tobacco companies faced a threat to their core cigarette business, they responded by promoting new products, which enabled them to claim a commitment to reducing harm. Yet such products were primarily aimed at boosting the industry’s total sales figures and bottom line, while also polishing the tarnished corporate image. In line with this, Chapter 1 ended by showing that major tobacco companies are now reporting to investors that, since the advent of next generation e-cigarettes and heated tobacco products, total sales and total number of users are increasing, having previously declined. In other words, these products appear to be acting not as alternatives, but as additives to cigarettes.

Chapter 1 also shows that some of these products – filter and “light” cigarettes and heated tobacco products - were developed internally by the major tobacco companies. Others – snus and e-cigarettes - were developed by smaller independent companies in which the major tobacco companies later invested, in order to both manage the potential threat they posed to cigarette sales and profits, and to claim they were reducing harm. Yet Box 4 in Chapter 1 also shows that, despite substantial investments in e-cigarettes, the major tobacco companies’ market share in e-cigarettes, while increasing, remains relatively small, and thus they remain a potential threat to the major tobacco companies.

This chapter builds on Chapter 1 by exploring data on the global tobacco and nicotine market to further understand the background and impact of the tobacco industry’s latest innovation, heated tobacco products (HTPs). Given the particular importance of HTPs to PMI (PMI has just a 0.3% share in the global e-cigarette market (80) yet is the market leader in HTPs (79) – this chapter also explores PMI’s targeting and pricing of its flagship HTP brand, IQOS, and whether this is done in a way that is likely to reduce harm.

2.1 Global cigarette sales are in decline, driven by higher income countries

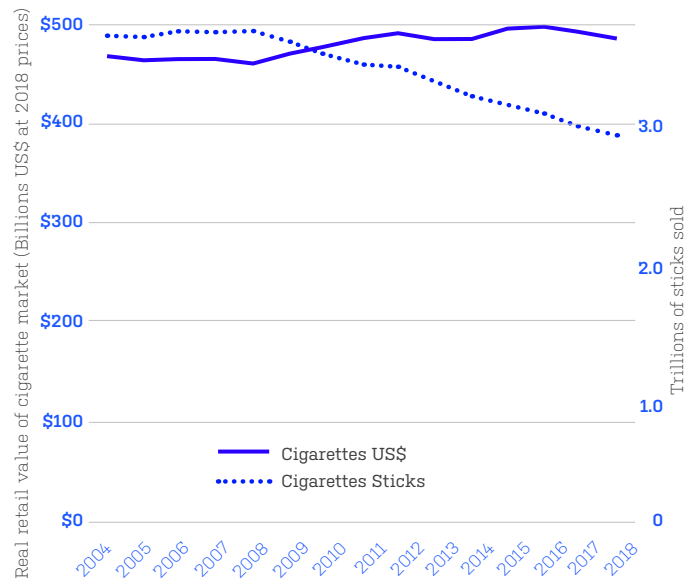
Euromonitor data,¹ covering 202 countries including all major tobacco markets other than China,² reveal that cigarette sales, which were increasing until 2008, albeit somewhat slowly, have been declining markedly since then (Figure 2.1).³

Detailed examination of the last 10-year period, 2008 to 2018, shows that the total number of cigarettes sold fell 20% (Table 1).⁴ However, this decline in sales was not universal. It is largely explained by marked decreases (26–30%) in high- and upper middle-income countries, which are by far the largest markets in absolute terms, together accounting for 70% of global cigarette sales in 2008 and 63% in 2018 (Table 1). Although cigarette sales increased by 8% in low-income countries, these are far smaller volume markets (accounting for just 3.4% of global volume in 2008 and 4.6% in 2018).

Historically Western Europe, a high-income market, has been the most profitable (87, 88) – Western Europe and North America combined accounted for 56% of the retail value of cigarettes in 2008; a figure that fell slightly to 51% in 2018.

Figure 2.1: Global retail value (US\$ billions) and number of cigarettes sold (in trillions of sticks) (excluding China)

[Data source: Euromonitor downloaded December 2019]



Retail value shown is real value (accounting for inflation) using 2018 exchange rates and 2018 prices.

Cigarettes include factory made cigarettes and Indonesian kreteks.

¹ Data on the global tobacco and nicotine market are scarce. Here we use Euromonitor data because work on this chapter began in early 2019, before Euromonitor received funding from both PMI and the Foundation for a Smoke-Free World. See source 86.

² We exclude China from the data presented in this chapter because the Chinese market is dominated by the Chinese National Tobacco Company, and the major tobacco companies featured in this report have a very low market share there.

³ Includes factory made cigarettes and kreteks only. If roll-your-own tobacco is converted to stick equivalents (0.7g of RYO tobacco = 1 stick) then RYO cigarettes accounted for just 4% of the cigarette market in 2018, and its inclusion had negligible impact on the results shown.

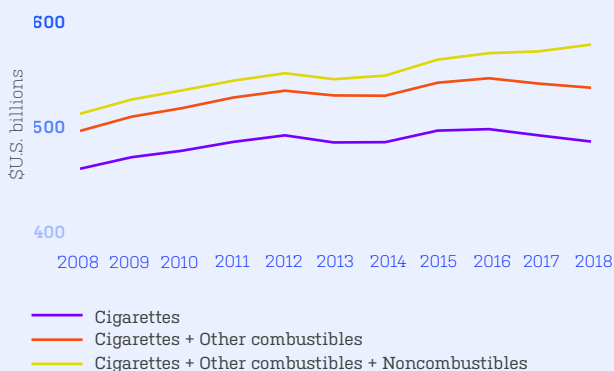
⁴ Even when China is included, there is a 9.7% fall in volume over this period.

Table 1: Number of cigarettes sold (in billions of sticks) by World Bank Income Economy
[Data source: Euromonitor, downloaded December 2019]

Cigarettes sold (rounded to the nearest billion sticks)				
	2008	2013	2018	Change in % (2008 vs. 2018)
High-Income	1642	1373	1155	-30%
Upper-Middle-Income	1022	906	760	-26%
Lower-Middle-Income	1007	1028	982	-3%
Low-Income	130	138	140	8%
Unclassified	1	1	1	0%
Total	3802	3447	3037	-20%

N.B. Data in columns may not sum to total due to rounding; data excludes China; "unclassified" refers to five countries/jurisdictions with available data not classified by World Bank and/or WHO.

Figure 2.2: Global retail value (billions of US\$) of tobacco and next generation products (excluding China)
[Data source: Euromonitor, downloaded December 2019]



Retail value shown is real value (accounting for inflation using 2018 exchange rates and 2018 prices).

Tobacco and nicotine market does not include nicotine replacement therapy which is classified as a health product.

Cigarettes include factory made cigarettes and Indonesian kreteks.

Other combustibles include cigars and cigarillos and tobacco for roll-your-own cigarettes, make your own cigarettes, pipes and shisha.

Noncombustibles include smokeless tobacco, e-cigarettes and heated tobacco products.

2.2

Profit from cigarette sales stagnating

Historically tobacco companies had managed to counter the negative impact of the decline in cigarette sales volumes on their profits by ensuring that cigarette prices increased faster than sales volumes declined (89). That pricing model was based on the tobacco industry’s ability to increase prices over and above tax increases, which in turn depended on the addictiveness of the cigarette and its lack of competitors (88, 89).

Analysts had been querying for some time whether that model was sustainable (90, 91). Indeed, profits had been declining since 2011 in Western Europe, the most developed cigarette market (87), heralding what might follow elsewhere with the advent of the e-cigarette, the growth in plain packaging legislation, and significant tobacco tax increases, all likely to have negative impact on profitability, as well as volume (92, 93).

In line with this, and the marked decline in volumes in the largest, most profitable markets (Table 1), the retail value⁵ of the global cigarette market has now been declining since 2016 (Figure 2.1). Although it is not yet clear whether this decline will be sustained, the trends detailed in the paragraph above suggest this is likely.

It is in this context that the major tobacco companies began launching and vigorously marketing their new generation of HTPs (the first being launched in 2010, and IQOS in 2014– see Timeline in Chapter 1).

⁵ A marker of the monetary value of the product sold through retail channels. Although this does not directly measure industry profit, it can be used as a crude proxy as industry profit will relate directly to retail value.

2.3 Global tobacco and NGP market is on increase driven by NGPs, most recently HTPs

Despite this decline in cigarette value, the total value of the combined global tobacco and nicotine market (excluding pharmaceutical nicotine) is now increasing again (Figure 2.2). Consistent with industry reports detailed in Chapter 1, Figure 2.2 shows this is due to the growth in novel noncombustible products – smokeless tobacco, e-cigarettes and HTPs combined. Although there is still some growth in combustible products other than cigarettes – roll-your-own tobacco, cigars and cigarillos, and sheesha and pipe tobacco – that growth has been small and insufficient to offset the decline in the cigarette market.

Closer examination of the noncombustible product market (Figure 2.3) shows that the greatest growth was initially in e-cigarettes and most recently in HTPs. In 2008 the main noncombustible product was smokeless tobacco (retail value US\$15.5 billion) but by 2018 the noncombustible market was divided more evenly between smokeless tobacco (retail value US\$13.0 billion), e-cigarettes (US\$14.9 billion) and HTPs (US\$11.9 billion). This followed rapid increases in the retail value of both e-cigarettes and HTPs (the latter occurring exponentially over a two-year period), while the retail value of smokeless tobacco fell quite steeply until 2013 before rising gradually.

Although there are no sales volume data available for e-cigarettes, such data do exist for heat sticks – the tobacco sticks used in HTPs (Figure 2.4). These sales data are useful in showing that the value growth in HTPs seen above does not simply reflect their greater value compared with e-cigarettes (see Chapter 1), as the volume of heat stick sales also shows an exponential increase.

2.4 New products still account for a very small share of the overall market

Despite their significant growth and tobacco industry claims about harm reduction (Chapter 3), these new products still account for a very small share of the overall tobacco and nicotine market – 3% of value in 2008 and 7% in 2018 (Figure 2.5).

Figure 2.3: Global retail value (billions of US\$) of noncombustible products (excluding China) [Data source: Euromonitor, downloaded December 2019]

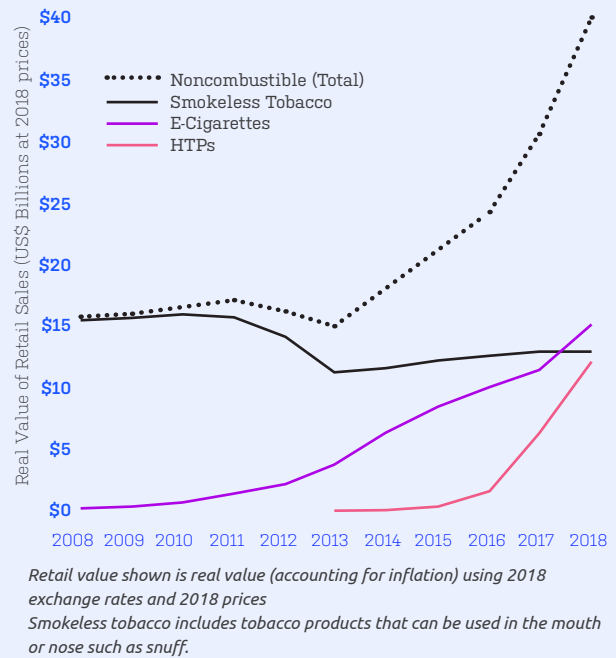


Figure 2.4: Global number of heat sticks sold (millions) (excluding China) [data source: Euromonitor downloaded December 2019]

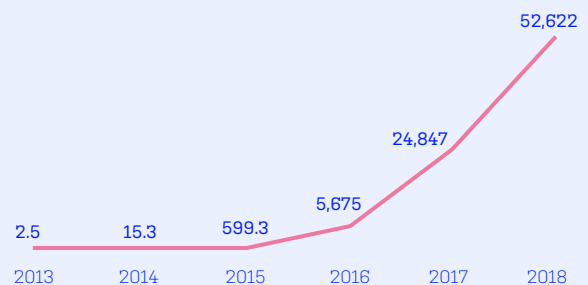
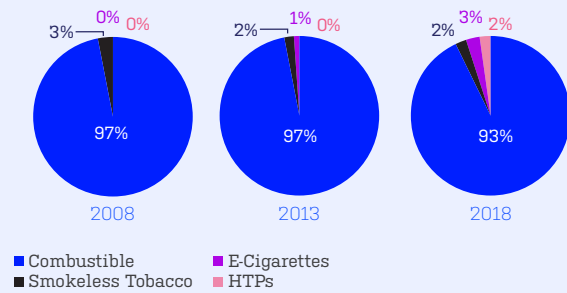
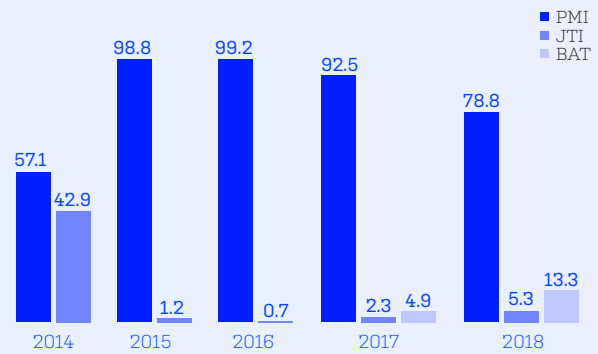


Figure 2.5: Composition of the global tobacco and next generation product market [Source: Euromonitor]



Value is real retail sales value at 2018 prices. Combustible products include factory made cigarettes, kreteks, cigars, cigarillos, and tobacco for RYO and MYO cigarettes, pipes and shisha. Smokeless tobacco includes tobacco products that can be used in the mouth or nose such as snuff.

Figure 2.6: Global HTP market share (heat sticks by volume) by tobacco company [Source: Euromonitor]



2.5 Philip Morris International dominates the HTP market

Since 2010, three of the four tobacco transnationals - Japan Tobacco International (JTI), PMI and BAT – have all launched HTPs (see Timeline, Chapter 1). Despite JTI being the first to launch, PMI, which launched its IQOS product in 2014, rapidly became the market leader, accounting for 99% of the global HTP market by 2016. Although competition in the sector then increased in 2017 and 2018, PMI still accounted for the overwhelming majority of the global HTP market in 2018 (Figure 2.6).

2.6 Philip Morris International’s claims versus its sales

2.6.1 January 2018: “We’re quitting smoking”... February 2019: “We sold 740 billion cigarettes in 2018” (94)

In January 2018, PMI announced it was going “smoke-free”:

“We’re building PMI’s future on smoke-free products that are a much better choice than cigarette smoking. Indeed, our vision – for all of us at PMI – is that these products will one day replace cigarettes.”

[PMI. *Designing a Smoke-Free Future*, Company website, accessed August 2019 (95)]

IQOS, PMI’s flagship HTP brand, is central to this agenda.



As of October 2019, IQOS had been launched in 46 countries (Figure 2.8). As well as at traditional sites of tobacco sales, PMI is selling IQOS devices (and in most locations heat sticks) in specialist high-tech, so-called “lifestyle” IQOS stores that closely resemble Apple stores. The U.K. alone has nine IQOS stores with more set to open.

Most of the company’s public rhetoric is now about harm reduction, its new products and a smoke-free future (Chapter 3). Yet investors are repeatedly assured that PMI is committed to maintaining leadership of the cigarette category. In its most recent 2018 annual report, PMI told investors that it sold 740 billion cigarettes in 2018 and commented, “Until we achieve our vision [smoke-free], we remain committed to maintaining a leading share in the international cigarette category and are managing our portfolio accordingly” (96).

In order to assess the validity of this seemingly contradictory messaging, we explore PMI’s markets specifically, both combustible and noncombustible.

2.6.2

PMI's combustible market

In 2018, PMI cigarettes accounted for 27.2% of global cigarette sales by volume, excluding China and the United States (97). The company reported that this share had remained flat since 2017. In its own materials, the company still proudly lists Marlboro as the world's number-one selling brand (Figure 2.7) alongside its other top-selling brands, including other global leaders, L&M (4th), Chesterfield (7th), Philip Morris (9th), Parliament (12th) and Bond Street (15th). PMI also owns a number of important local cigarette brands around the globe, including in Indonesia, A Mild (2nd best-selling brand), Dji Sam Soe (3rd), U Mild (8th) and Sampoerna (9th); in the Philippines, Fortune (2nd) and Jackpot (5th); in Canada, Belmont (3.6%, 9th), Next (3rd) and Canadian Classics (5th), and Delicados (4th) in Mexico.

2.6.3

PMI's noncombustible market

PMI's noncombustible market is dominated by HTPs. As of 2018, it had almost 80% of the global HTP market (as measured by heat sticks – Figure 2.6) but just 0.3% of the global e-cigarette market [see Chapter 1, Box 4 for further details of the e-cigarette market; (80)], indicating the importance of HTPs to PMI.

Following a series of staggered country launches from November 2014 (Figure 2.8), PMI reported in October 2019 that the total number of IQOS users was over 12 million and that IQOS had become the 12th largest international tobacco brand outside of the U.S. and China, including cigarettes (98). However, the total number of IQOS users is defined as adults who only used IQOS for at least 5% of their daily tobacco consumption over the previous seven days. It is therefore likely that the true number of users who use IQOS exclusively or for the majority of their tobacco consumption is significantly lower.

In addition to these official launches, Euromonitor data and in-country intelligence reveal that PMI sold IQOS in Vietnam, Indonesia and the Philippines in 2018. It is possible, therefore, that the company has soft-launched IQOS in these countries. In September 2019, PMI's president for South and Southeast Asia described Vietnam, Indonesia and Philippines as "key markets" for IQOS (99).

Figure 2.7: Image taken from PMI's online Annual Report 2018

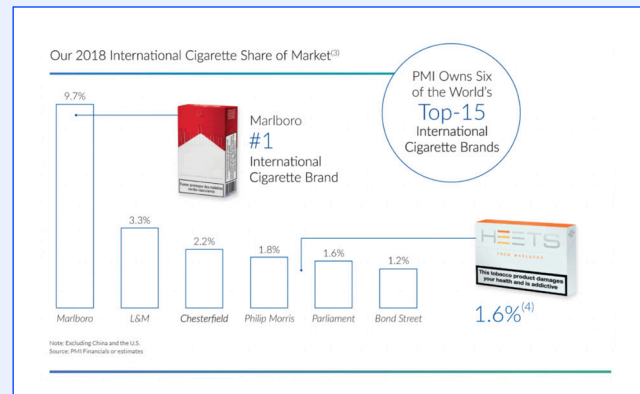


Figure 2.8: IQOS launches by year [Source: PMI annual reports, investor presentations and webpage]

2014 Nov	2015 Dec	2016 Jan	2017 Feb Mar	2018 Feb Mar	2019 Feb Mar
Italy	Canada	Czech Republic	Andorra	Hungary	
Japan	Denmark	France	Croatia	Sweden	
Portugal	Germany	Poland	Curaçao	UAE	
Switzerland	Greece	Slovak Republic	Cyprus	USA	
Romania	Israel	Slovenia	Latvia	Albania	
Russia	Lithuania	South Korea	Armenia	Belarus	
	Monaco	Colombia	Bulgaria	Bosnia and Herzegovina	
	Netherlands	Guatemala	Dominican Republic	Malaysia	
	New Zealand	Serbia	Moldova		
	Spain				
	U.K.				
	Kazakhstan				
	South Africa				
	Ukraine				

■ High-income country
■ Upper-middle-income country
■ Lower-middle-income country

World Bank was the data source for income-group.

2.7

Harm reduction may not be PMI's primary goal

Given PMI's requirement to generate profits, it will likely launch IQOS in markets where it can make the most profit. However, if PMI's reason for introducing IQOS, as it claims (see Chapter 3), was to reduce cigarette sales, it would arguably:

- target IQOS at countries with increasing cigarette sales in order to genuinely replace smoking and curtail the smoking epidemic;
- target countries with poor tobacco control regulation on the basis that these are countries where smoking could increase due to standard tobacco industry activities;
- make IQOS heat sticks cheaper than its cigarettes to make it easier for smokers to switch.

To test our assumptions, we assessed the characteristics of countries where IQOS was officially launched. Given that IQOS was first launched in 2014, we examined Euromonitor data on global tobacco markets from 2008 to 2018.

2.7.1

IQOS launched in countries with declining cigarette sales

Cigarette sales are declining globally, and this is the general pattern found in countries where IQOS had been officially launched by October 2019 (Figure 2.9). However, in countries where IQOS had not been launched, cigarette sales have been stable (Figure 2.9). The decline in cigarette sales in countries where IQOS was launched was apparent pre-2014. Thus it is highly unlikely that the continued decline of cigarette sales is due to IQOS, particularly given the small proportion of tobacco sales attributable to HTPs (Figure 2.5).

Of the countries where IQOS has been launched, two thirds are high income countries (HICs), the majority in Europe⁶, nearly a third are upper-middle income countries and just two are lower-middle income countries (Figure 2.8).

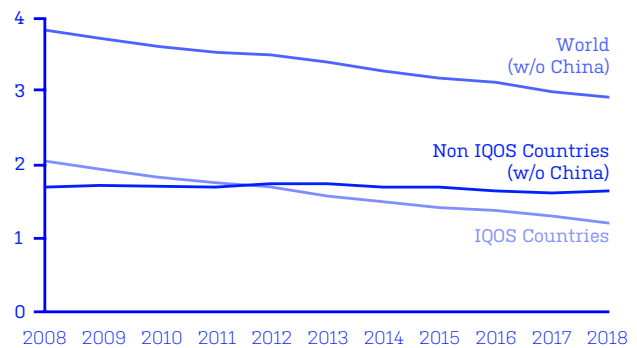
2.7.2

IQOS launched in high-income countries that have strong tobacco control measures

The MPOWER Index indicates the degree to which countries have implemented the recommended regulations of the Framework Convention on Tobacco Control (WHO FCTC). We created a composite score for MPOWER (higher score=stronger regulation). A comparison between markets with and without IQOS reveals that countries with IQOS have a higher average score (3.9/6) than countries without IQOS (3.0/6). That is, PMI appears to be targeting countries with more comprehensive tobacco control legislation rather than those with weaker regulation.

Furthermore, in many countries, HTPs can circumvent current tobacco legislation (smoke-free legislation, point of sale display bans, regular large tax increases). This can occur for various reasons - often because the heating device is not

Figure 2.9: Global number of cigarettes sold (trillions of sticks) in countries where IQOS is sold vs. not sold (excluding China) [data source: © Euromonitor downloaded December 2019]



recognized as a tobacco product or in some cases because HTPs are regulated as smokeless tobacco products (Box 1). This in turn helps renormalize tobacco product use.

2.7.3

IQOS is not significantly cheaper than smoking

The trend in smoking in many countries, particularly high-income countries, is that of downtrading, where smokers are seeking cheaper tobacco products and growing numbers of smokers are using such products, partly in response to rising tobacco prices. (100) One might therefore expect IQOS to be priced more cheaply than combustible cigarettes, in order to encourage smokers to switch.

From the available data (downloaded in 2019), the price difference between a combustible Marlboro cigarette and an IQOS heat stick is relatively small: An IQOS stick is on average 1 cent cheaper than a Marlboro stick. In line with BAT reporting that profit margins on HTPs are approximately two to three times greater than those on cigarettes (see Chapter 1), the profit margins on an IQOS heat stick also exceed those of combustible cigarettes. (101-103) A key reason for this greater profitability of HTPs is their more favorable tax treatment (102) - although HTPs are now increasingly regulated as tobacco products, very few are subject to the same level of tax as cigarettes. For this reason, PMI lists heat sticks being taxed as cigarettes as a risk to the future commercial success of IQOS and has been lobbying for favorable tax policies for IQOS (see Chapter 3).

In addition to heat sticks, IQOS consumers need to purchase a holder and a charger, often sold as a kit. In all countries with available data, the IQOS kit cost more than US\$50; in several instances, it was more than US\$100. There are no data on how often holders and chargers need to be replaced.

⁶ By October 2019, PMI had launched IQOS predominantly in European countries (34 countries), followed by the Americas (six countries), the Western Pacific Region (four countries), and Africa and Eastern Mediterranean (one country each).

2.7.4

Overall PMI's targeting of IQOS suggests its primary aim is to maximize total sales (of cigarettes and IQOS combined) rather than reduce harm

Overall, comparing markets where PMI has launched IQOS with those where it has not, we find that PMI has targeted IQOS to markets where cigarette sales are already falling and where regulations are greater. Of course, these findings may be interlinked and countries with more comprehensive restrictions are more likely to have declining smoking prevalence and to be high-income markets. One reason, therefore, for PMI to target such markets is that consumers have greater disposable income and may be more willing to initiate IQOS use given its not insignificant start-up cost. Further, its early use in such markets may enable IQOS to be established as an aspirational brand globally.

An alternative interpretation is that PMI is targeting IQOS to markets where it can no longer maximize sales and profits from cigarettes, where its cigarette sales are threatened by growing regulation. Meanwhile, as we explore further in Chapter 3, it continues to maximize sales of cigarettes in other markets. In other words, this is not about reducing harm, but about maximizing sales and profits through a coordinated strategy to maximize sales of any product in all markets.

In terms of pricing, IQOS users have significantly greater start-up costs than cigarette smokers and, although there is a small price incentive to switch from cigarettes to IQOS in terms of the day-to-day cost, the significantly greater profitability of IQOS compared to cigarettes suggests that price incentive could be greater.

Box 1: How HTPs can circumvent existing tobacco control laws

There are two separate components to most HTPs, the disposable heat sticks and the reusable heating device. Given that the heating device contains no tobacco per se, these products can circumvent existing tobacco control labeling, marketing and tax laws in some countries. Furthermore, as these products are being marketed as "smoke-free" there is potential that current legislation prohibiting smoking in indoor public places may also be bypassed by HTPs. Examples are given below.

Tobacco advertising promotion and sponsorship laws

Countries that prohibit the marketing and display of tobacco products mostly also prohibit the marketing and display of heat sticks, but these restrictions do not apply to HTP devices.

This explains why so many PMI IQOS stores displaying the devices have been able to open in countries with relatively strong tobacco advertising promotion and sponsorship laws.

Health warnings and plain packaging

HTPs are regulated as smokeless tobacco products in many countries, (particularly within the European Union). Smokeless tobacco products are regulated less stringently than cigarettes. For example, under national regulations implemented through the EU Tobacco Products Directive (TPD), smokeless tobacco is subject to smaller (30%) text-only health warnings and no plain packaging in countries such as France, Norway, U.K. and Hungary.

However, Canada and Israel have implemented plain packaging for heat sticks and HTP devices.

Tax

Smokeless tobacco products, pipe tobacco and novel tobacco products are most often subject to lower tax rates than combustible tobacco products.

Thus far, only Portugal and Israel are applying the same level of tax to both heat sticks and combustible tobacco. At the time of writing, no country has levied an excise tax on HTP devices.

Smoke-free legislation

Many countries follow the WHO FCTC definition of smoking, which refers to being in possession or control of a "lit tobacco product." HTPs are not "lit", and therefore their use in public places may not be covered by existing smoke-free laws. Tobacco companies' claims that HTPs are "smoke-free" may compound these perceptions.

The information in this box was based on data provided by the Campaign for Tobacco Free Kids, August 2019



3

Philip Morris International: Its Smoke-Free Rhetoric Doesn't Reflect Its Behavior

Key Messages

PMI's "smoke free" vision, and highly funded PR campaigns are a calculated corporate strategy to renormalize the company so it can re-exert its declining influence over policy.

PMI's "smoke free" claims are illogical and, if realized, will successfully destroy its business; for the company to survive it needs to attract nonsmokers to both its combustible cigarette and IQOS products.

To this end, PMI continues to maximize sales of combustible cigarettes: It is marketing them heavily, developing and promoting new combustible brands; buying new cigarette businesses; raising legal challenges against effective tobacco control legislation, and deliberately undermining the WHO FCTC.

Though PMI says IQOS is only for existing adult smokers, the company has marketed it in a way that appeals to youth and young adults, including using attractive young females as young as 19 to promote IQOS products in Romania and on social media.

3.1

The implausible smoke-free claim

“If you don’t smoke, don’t start. If you smoke, quit. If you don’t quit, change.” This is the tag line from PMI’s latest PR campaign, *UNSMOKE*. PMI claims that its alternative products are for smokers who cannot give up. They are not for nonsmokers and certainly not for youth (104, 105).

However, this scenario makes absolutely no business sense.

- Imagine that PMI’s explicit goal is achieved, and all current smokers switch to IQOS.
- Now imagine that not a single nonsmoker initiates IQOS use or combustible cigarette use, again as per the company’s public declarations.
- Now fast forward to approximately 90 years’ time (and possibly considerably less, given concerns about the health impacts of IQOS) (106) when the last IQOS user is no longer with us. Zero customers. Zero sales.

In 2019, Ruth Malone, editor-in-chief of the academic journal *Tobacco Control*, stated, “selling products ostensibly targeted only for a rapidly shrinking pool of current smokers is not a sustainable business plan” (107).

The reality is that the industry needs to create new users for its products, whether cigarettes or alternative products such as e-cigarettes and heated tobacco products. PMI’s “smoke free” agenda may be a simple replication of the tobacco industry’s approach to smokeless tobacco. Industry documents revealed that smoke-free products were seen as a way to create a new form of tobacco use among those no longer willing to take up smoking and “make new profits rather than cannibalise existing profits from cigarettes” (39).

This chapter first outlines PMI’s PR spin to convince us of its implausible smoke-free direction before examining the reality behind that spin. It shows the company has engaged in relentless lobbying, PR campaigns and multifaceted approaches to influence science and public health in order to manage the future direction of tobacco control. This is in keeping with its 2014 10-year corporate affairs plan, in which PMI’s main objective was to “establish PMI as a trusted and indispensable partner, leading its sector and bringing solutions to the table.”

It's Time

In contrast to “Hold My Light” and “Unsmoke,” PMI’s “It’s Time” campaign targets decision-makers rather than the general public. Most decision-makers and public health experts refuse to engage with an industry that continues to sell cigarettes (and market them in questionable ways—see Section 3.4.1) and oppose tobacco control policies that reduce smoking prevalence. Nevertheless, PMI is intent on using its smoke-free rhetoric to gain access to policy debates (Figure 3.6).

PMI has issued frequent press releases and videos, as well as publishing letters and ads in the mainstream media promoting PMI’s commitment to “giving up” smoking, and has secured substantial paid-for press coverage. To this end PMI has been associated with respected international broadsheet newspapers such as The Wall Street Journal, the Financial Times, and the policy and political news organization Politico. All have featured advertisements and sponsored content from the tobacco company about its smoke-free agenda. PMI’s CEO, who until recently had not attempted to engage with the public at all, has written public

letters and made videos espousing his commitment to the future health of all current smokers. He has reached out to decision-makers and political leaders for PMI to be taken seriously as a partner to and facilitator of public health.

PMI has also employed several PR and media companies to produce content on the various ways consumers switch to alternative products. For example, Vice media has created a new company, Change Incorporated, whose purpose appears (based on its attempts to reach advocates and academics in tobacco control for interviews) to produce media content and to encourage conversations about the best way to give up smoking. Change Incorporated disseminates its content on YouTube, social media channels and a dedicated contemporary website seemingly aimed toward professionals in their 20s, 30s and 40s. Change Incorporated receives PMI funding for this work.

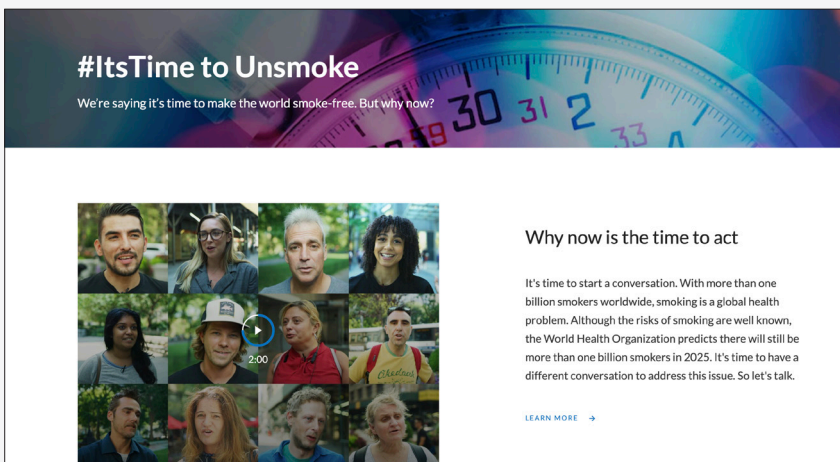


Figure 3.6: PMI’s description of the “It’s Time” campaign on its corporate website, December 2019

3.3

The Reality: Creating a New Epidemic

3.3.1

"Smoke-Free" is part of PMI's corporate agenda

Leaked 2014 PMI documents outline the company's corporate affairs strategy for the next 10 years. PMI's main objective was to "establish PMI as a trusted and indispensable partner, leading its sector and bringing solutions to the table (Figure 3.7) (68)." The documents reveal its plan to expand its business and attract new customers via continued use of harm reduction claims (111). The documents show a company aware of its "demonization" and fearful of the detrimental impact this has had on its ability to shape policy. So-called "reduced risk products" are seen not only as essential to "drive future growth" but also to "normalize" the company's image and to allow it to once again shape regulation in its own interest.

Part of its strategy to secure this objective was to use the tactics outlined below to secure PMI's RRP portfolio as the pathway for future growth (Figure 3.8).

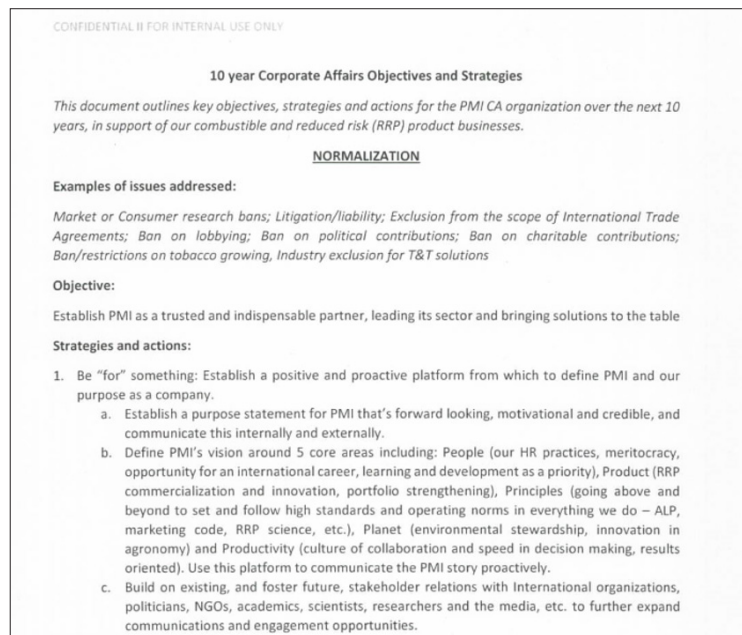


Figure 3.7: PMI 10-year corporate affairs objectives and strategies, p1 (68)

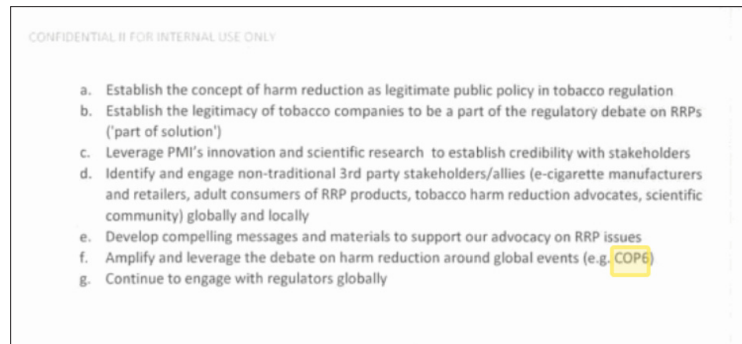


Figure 3.8: PMI 10 year corporate affairs objectives and strategies: Reduced Risk Products, p5(68)

3.3.2 IQOS branding: 'This Changes Everything'

PMI's marketing strategies for IQOS suggest they are intending to appeal to existing smokers who are seeking a "better alternative," while arguably also positioning the brand as a product that young people and nonsmokers may find appealing.

The branding, especially the use of tiny, beautiful hummingbirds (Figure 3.10), suggests IQOS is sleekly designed, discreet and attractive. These birds have extraordinary agility and can fly backwards, hover up and down, and stop instantly after flying at full speed (112). These attributes suggest high levels of control, which contrasts with the experience of many combustible cigarette smokers. Hummingbirds are described as epitomizing the "lightness of being" (113) and creating connotations of playfulness, joy and fulfillment. Unlike cigarette smoking, which smokers describe as creating feelings of "heaviness" that weigh them down and impede and frustrate what they are doing, the hummingbird's speed and dexterity suggest a very different experience. Whereas smoking undermines feelings of self-efficacy, the hummingbird suggests exquisite control and precision. By implication, this branding conveys IQOS as being wholly different than traditional smoking and suggests to potential IQOS users that they will retain or achieve a sense of autonomy and free will.



Figure 3.10: Source: (115)

The colors used – the blue and green – are reminiscent of menthol tobacco (green) and mild cigarettes (blue), and therefore have strong connotations with the combustible tobacco variants most likely to appeal to young people. The headline "Hello Clean" contrasts sharply with connotations of smoking, which smokers themselves describe as "dirty" and "disgusting" (114). The advertisement uses light to intensify connotations of lightness, purity and cleanliness, and these effects further distance IQOS from smoked tobacco.

The IQOS tagline "This Changes Everything" creates a sense of transformation that is ambiguous. While it could literally refer to a change in the nicotine source that smokers access, it could also catalyze personal transformation and mark a transition. These latter attributes could appeal to young people, who in past generations used smoking as a rite of passage to demonstrate their movement from child to adult.



Figure 3.9: Selected Instagram posts from self-reported IQOS Brand Ambassadors, including a female who – according to her own posts – turned 22 years old in 2019. Hashtags included #iqosstories, #iqos3 and #iamcreative.

3.3.3 Youth-oriented IQOS marketing

Certain marketing strategies suggest much more directly that IQOS is being marketed heavily to youth and young adults. For instance, even though PMI's chief executive officer has declared that they "do not, and will not, market or sell our products to youth" (116), a 2019 Reuters investigation exposed the widespread use of young female "influencers" (or "ambassadors") in IQOS social media campaigns (117). In one example, a 21-year-old Russian woman was described as promoting IQOS via "seductive photos of herself drinking wine, swimming and posing with little clothing in luxurious settings" (117). In response, PMI claimed they were "deeply disappointed" and said they had immediately suspended all IQOS social media influencer campaigns, as this type of promotion breaches its own marketing standards (117, 118). Those marketing standards state that PMI does not use "youth-oriented celebrities, or models who are or appear to be under the age of 25" in their "day-to-day marketing" and that this applies to "at all times, to all PMI's marketing professionals, globally (119)."

Yet PMI appears to have continued to use young females to promote IQOS on Instagram, including individuals under the age of 25. IQOS-related content continued to be posted on Instagram by self-reported IQOS brand ambassadors in the latter half of 2019, including by females who (according to their own Instagram accounts) are under 25 years old. Much of this content shows curated images of IQOS' customizable features such as the choice of colors, finishes or accessories (e.g. Figure 3.9), which are interspersed among more personal images showing the individual in aspirational scenes such as wearing high-fashion designer clothes, partying with friends or at a glamorous travel destination. The "influencer" marketing approach gives the impression of more authentic promotional posts (120), though the

ambassadors' IQOS posts are sometimes accompanied by overt marketing messages, such as "Customize your #IQOS device".

In Romania, where the ambassadors we identified are based, a recruitment initiative called "BeLikeMe" recruits "IQOS Consultants" and stipulates a minimum age of 19 years old for the role. The IQOS Consultants are employed to work in IQOS retail outlets in shopping malls, and to promote IQOS at various events, including music festivals, exclusive parties, and events organized by Qreator (see Figures 3.11 and 3.12). Qreator is an initiative established by PMI to host music and fashion events in Bucharest and promote collaborations between IQOS and fashion designers and artists (121). In doing so, PMI is ultimately attempting to build a strong association between IQOS and cutting-edge fashion, artists and designers (121). Many would argue that recruiting people under 25 years old into IQOS promotional roles such as these, and promoting these events and IQOS ambassadors' activities on social media, breaches PMI's own marketing standards.

While we have focused mainly on recent Romanian examples, wider examples of IQOS Instagram posts suggest a strategic attempt to associate IQOS with aspirational attributes such as glamour, sophistication and success, and to evoke feelings of belonging and attractiveness (e.g. Figure 3.13) (122). Integrating IQOS with events such as Valentine's Day, by launching a new color especially for Valentine's Day, can pique interest, position IQOS as an attractive brand for women, and create a fun dynamic likely to appeal to young people. Associating IQOS with Christmas, as one ambassador does in an Instagram post, taps into a near-universal feeling of goodwill and connectedness (122).

Young adult role models' endorsement of IQOS positions the brand as desirable and appropriate for young people generally, irrespective of their smoking status, and has potentially enormous reach. Hashtags such as #IQOSStories, #IQOS3 and #IAmQreative are likely to be almost universally understood, accessible and replicable. The Campaign for Tobacco Free Kids cites data showing social media posts using #IQOS on Instagram or Twitter had been viewed 179 million times between March 20 2018 and March 20 2019 (122) and around 72% of U.S. teens use Instagram (123). Regardless of the intended audience, PMI's promotional strategy for IQOS is likely to reach large numbers of nonsmoking young people.



Figure 3.11: Top: screenshots from the website of BeLikeMe.ro, a recruitment initiative for "IQOS Consultants" in Romania where the minimum application age is "19 years" (Google Translate used). Bottom: Screenshots from the BeLikeMe Instagram account showing IQOS Consultants promoting IQOS at events in Romania.



Figure 3.12: Screenshots from the Instagram account of "The Brunch Affair" nightlife company, which hosts events sponsored by IQOS, and attended and promoted by IQOS Consultants who may be as young as 19 years old, recruited via BeLikeMe.



Figure 3.13: Screenshots from the IQOS Stories Instagram account

3.3.4

Utilizing respected global platforms to rehabilitate image and secure future influence

In line with these leaked documents, PMI has been tirelessly attempting to gain access to (and then widely promoting its presence at) high level international events as a means of rehabilitating its image and securing influence over global institutions and policy elites.

This strategy is a thinly veiled attempt to roll back Article 5.3. If PMI is successful then it will be in a position to exert its influence over new products, and likely, its conventional combustibles too (68). Since January 2019 alone, such efforts include:

January 2019–World Economic Forum (WEF; Davos, Switzerland)

PMI used the World Economic Forum (where private wealth and political power meet) to launch its first white paper, “Public Health—Much Harder Than Rocket Science.” The paper summarized the findings of a PMI-funded survey which stated that most smokers want governments to support switching to alternatives and to allow tobacco companies to be part of a technological solution to the smoking epidemic (124). PMI was not an invited guest at the World Economic Forum, but nevertheless; held a side event with The Wall Street Journal and sponsored the Davos Playbook, Politico’s daily newsletter distributed to attendees. It used its sponsorship to promote its “smoke-free” transformation to the world’s powerful decision-makers.

June 2019–G20 Summit (Osaka, Japan)

The G20 (or Group of 20) is an international forum for the governments and central bank governors from 19 countries and the EU. It was founded in 1999 as a forum for discussing policy pertaining to the promotion of international financial stability. At the 2019 meeting in Osaka, PMI took out a two-page spread in *The Japan Times* broadsheet telling the world’s leaders that the company had changed and that dialogue was necessary (Figure 3.14).

June 2019 - Cannes Lions International Festival of Creativity (Cannes, France)

PMI also needs to find creative agencies willing to work with it. To this end, PMI attended the festival for Cannes Lions International Festival of Creativity to talk about alternative tobacco products and to potentially recruit “the best creative brains and the most robust platforms to join us on this mission” (125). PMI had its own program of events, its own large “beach house” set up, and paid for celebrity speakers including actor and activist Rose McGowan and rapper Wyclef Jean.

The festival organizers were criticized when PMI also spoke in the festival’s Good Track stream (reserved for those organizations that will make the world a better place) with reputable organizations such as Greenpeace and U.N. Women. Given that PMI is on track to produce 800 billion lethal combustible cigarettes in 2019, its placement in the Good Track is refutable.

October 2019 – United Nations General Assembly (New York City, USA)

PMI’s charm offensive at the United Nations General Assembly began with publication of “The Essential Guide to the UNGA,” a document that cross-promoted the company’s Unsmoke campaign. Just before UNGA began, PMI’s CEO gave a keynote at Concordia, a high-level event that fosters partnerships between businesses, governments and U.N. agencies. Officials from the U.N.’s World Food Program, the U.N. Foundation and the World Bank were listed as speakers and, though not listed in the program, PMI’s vice president of global partnerships and cooperation spoke at the event.

During the actual UNGA, Prof. Bob Eccles, a paid PMI adviser, spoke at a Cornell Club side event on Exclusion and Engagement in Sustainable Investing. According to Tobacco Free Portfolios, the event targeted many of the financial organizations that have already committed to remove tobacco from their portfolios.

January to September 2019–Simultaneous Direct Attempts to Undermine Article 5.3

In January 2019, PMI published a statement to coincide with the World Economic Forum in Davos, stating that “anti-tobacco lobbies” and the tobacco industry needed to work collaboratively, to realize a “once in a lifetime opportunity,” saying “we must seize it—and seize it together” (243). This coincided with an open letter to the WHO executive board, written by the Foundation for a Smoke-free World (see Section 4.3), that appealed for engagement with the tobacco industry.

Furthermore, on his last day of tenure as head of the U.N. office in Geneva, to U.N. Secretary-General António Guterres, Michael Møller suggested that “a more nuanced” (280) approach might be warranted in relation to existing policies banning U.N. agency engagement with tobacco companies. Questions have been raised about whether Møller was lobbied by PMI. Many newly appointed executives at PMI have U.N. links.



Figure 3.14: Advertisement from PMI in *The Japan Times* in June 2019 during the G20 summit in Osaka.

3.3.5

Co-opting public health

PMI is increasingly using the same language as those working in public health in its external communication activities. Through its use of terms such as “smoke-free,” the company is not only confusing the public, but is also presenting itself as the solution to global tobacco control. PMI has produced what it is referring to as “white papers” (see above), has provided analyses of the relative success/failure of the WHO FCTC (126), funded scientists to produce research on harm reduction and alternative tobacco products (Chapter 4), and trained journalists by inviting them on “science tours” of its IQOS labs to persuade them that HTPs are less harmful than smoking.

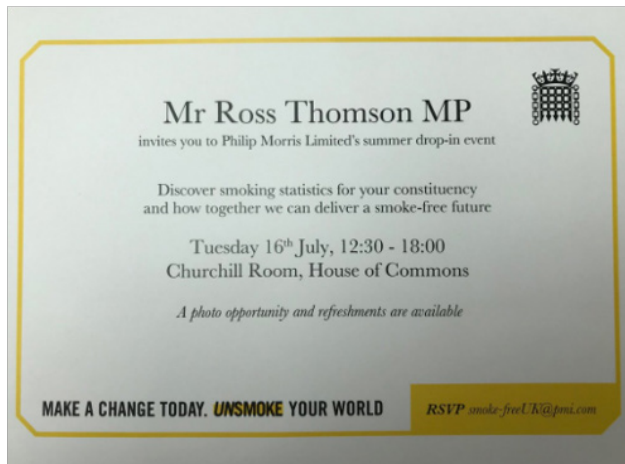


Figure 3.15: Invitation to Philip Morris International’s summer drop in event at U.K. Parliament.

3.3.6

Lobbying for a favorable environment for its products

PMI is lobbying extensively to secure a policy environment favorable to e-cigarette and HTP sales.⁷ The company is attempting to:

- 1. Gain access** for its alternative products such as IQOS to countries that do not permit sales of alternative tobacco products. For example, PMI has lobbied hard in Australia (127) to overturn bans on products such as e-cigarettes and HTPs. Following the U.S. Food and Drug Administration (FDA) ruling in April 2019 permitting IQOS sales in the U.S., PMI made no secret that it would use this ruling to lobby for other countries to allow sales of HTPs.
- 2. Prevent bans** of alternative tobacco products in countries considering a ban. Lobbying activities to this effect have been observed in India (which has now implemented a ban) and Latin America. In the latter, PMI reportedly hired former Spanish Prime Minister José Maria Aznar to lobby on its behalf (128). Hong Kong has experienced significant tobacco industry interference after announcing its intention to ban both e-cigarettes and HTPs (130).
- 3. Influence policy** on how these products ought to be regulated and taxed in countries that do permit their sale.
- 4. Get IQOS recommended as a smoking “cessation” product.**

In New Zealand and the U.K., PMI attempted to promote IQOS to smokers via health and social care organizations. In New Zealand, the company lobbied key figures in the ministry of health and approached South Auckland’s Counties Manukau District Health Board (DHB) in an attempt to give away its IQOS for use in smoking cessation groups (132). It also reached out to the head of Auckland Action Against Poverty offering to educate smokers (particularly women) “that there are much less harmful alternative products available.” Despite repeated attempts, the head of the charity refused to meet, stating, “They’re just trying to find avenues to target low-income communities to make a profit and so I’m quite appalled that this is a tactic a corporation is using” (132).

In the U.K., PMI used the 70th anniversary of the U.K. National Health Service (NHS) in 2018 to lobby health secretary Matt Hancock and regional NHS Trusts all over the country, encouraging a joint approach toward helping NHS staff who smoke to quit or “switch” (133). PMI wanted to offer IQOS to NHS staff for free. The advance was rejected. Similar lobbying attempts have been made to local councils in the U.K.. More recently, in July 2019, a U.K. Member of Parliament invited fellow members to a PMI event to discuss how “together we can deliver a smoke-free future” (Figure 3.15).

⁷ The examples provided in this section serve to illustrate the multifaceted lobbying by PMI, rather than providing an exhaustive list.

3.4

The Reality: Maintaining the Smoking Epidemic

Despite PMI's public presentation of itself as a company going "smoke-free," the company continues to:

- Market combustibles;
- Develop new combustible brands;
- Buy other tobacco companies that sell combustible products;
- Raise legal challenges against countries pursuing tobacco control legislation against combustibles, and
- Deliberately undermine tobacco control and WHO Framework Convention on Tobacco Control.

3.4.1

Marketing combustibles to youth

In its May 2019 Annual General Meeting, PMI CEO André Calantzopoulos reported that PMI would continue to maintain its position as the cigarette market leader by using "more impactful initiatives that can be deployed swiftly in any market." This section describes some of the many actions PMI has taken to protect and promote combustible cigarettes while simultaneously professing to be a company in transformation.

Research evidence has shown that menthol cigarettes and capsule brands appeal to youth and nonsmokers (134-137). Similarly, marketing at festivals and events attended by young adults also aims to attract youth (138). The following examples reveal how PMI is currently marketing capsule brand variants of its number one selling Marlboro brand at music events and at the point of sale, sometimes next to children's products i.e. candy and sweets.

Latin America (Argentina, Bolivia, Brazil, Chile, Peru, and Costa Rica): While overall sales of cigarettes in Latin America are declining, sales of flavored cigarettes, particularly capsule cigarettes, have increased in recent years, with sales estimated to account for more than 25% of the cigarette market in Chile (139). Attempts to implement flavor bans in the region have been vehemently opposed by the industry (140). The growth in flavor capsule sales has often occurred in countries that have relatively good marketing bans but permit point-of-sale displays. Indeed the majority of tobacco industry marketing expenditure in the Latin American region is at the point of sale (140-143). Between March and April 2019, PMI's Marlboro Mega Blast Capsule brand was found at the point of sale and at events for young people across Argentina and Costa Rica, which violates tobacco control laws (144, 145) and is against the tobacco company's supposed



Figure 3.17: Marlboro flavored capsule variants advertised at point of sale in Colombia [Source: Corporate Accountability International, May 24, 2019]

commitment to a smoke-free future in these countries (146).

Brightly colored flavored capsule variants of Marlboro cigarettes are being advertised and sold from convenience stores and snack carts alongside sweets and snacks that appeal to children (Figure 3.17) (147).

Israel: In 2019, PMI advertised its Marlboro cigarettes in print publications promoting music-themed limited-edition packs. The ads featured images of speakers alongside the slogan "What's Your Sound?" (Figure 3.18). The "You Decide" campaign shares parallels to the controversial "Be Marlboro" advertising campaign (148) which caused outcry among public health advocates for its youth appeal and led to fines for PMI and the eventual withdrawal of the campaign. Both "Be Marlboro" and "You Decide" were conceived by the advertising agency Leo Burnett, which has worked with PMI since created the Marlboro Man campaign in 1954.

Indonesia: In 2019, PMI advertised Marlboro on billboards using its "You Decide" campaign (Figure 3.19).



Figure 3.18: Print advertisement, Israel, June 2019. [Source: Campaign for Tobacco Free Kids, June 2019]

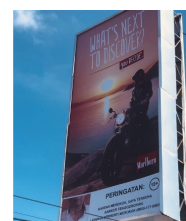


Figure 3.19: Billboard advertisement, Indonesia, June 2019 [Source: Campaign for Tobacco Free Kids, June 2019]

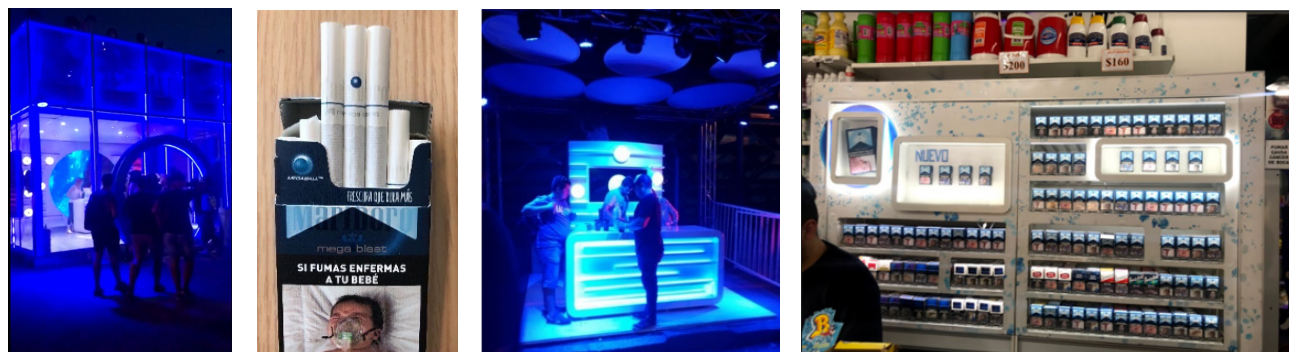


Figure 3.16: From top left to right: Marlboro Mega Blast promotional sales stand at Lollapalooza festival in Buenos Aires (March 2019), Marlboro Mega Blast cigarettes for sale in Argentina, Marlboro Mega blast promotional sales stand at "Rock at Baradero" festival in Buenos Aires; Point of sale display of Marlboro cigarettes in Argentina (146).

3.4.2

Cigarettes: PMI continues to redesign pre-existing brands and introduce new ones

Marketing literature reveals that packaging updates and redesigns can lead to an immediate increase in sales (149, 150).

Indonesia: In 2018, at the same time as launching its “Un-smoke” campaign promoting switching to alternative products such as IQOS (see section 3.1), the company introduced a new combustible cigarette brand called *Philip Morris Bold*. The launch was accompanied by television and billboard advertising (151). According to WHO, a huge 76.2% of men and 3.6% of women in Indonesia smoke (male prevalence has increased from 62% in 2005). PMI is introducing its IQOS HTP in the country. If PMI were truly committed to smoking cessation, we would see an end to all marketing of combustibles.

U.K.: Plain packaging for tobacco products was fully implemented in the U.K. in May 2017. PMI identified legislation loopholes and responded by, for example, adding innovations to its packs prior to the full implementation. A resealable pack was introduced for premium brand Marlboro, and beveled edges were introduced to Marlboro and also to value brand Chesterfield as a premium feature. These pack innovations positively differentiate PMI’s brands from others in terms of attractiveness (152).

3.4.3

Expanding its global combustible business through acquisitions

Costa Rica: Since the 1970s, PMI has owned a proportion of Tabacalera Costarricense, S.A. and Mendiola y Compañía, S.A. On March 21, 2018, PMI acquired the remaining 49% interest in these companies for US\$95 million. PMI now owns 100% of these Costa Rican affiliates. The main cigarette brands that the company sells in Costa Rica are Derby, Marlboro and L&M.

Kenya: In January 2019, PMI was in negotiations to buy a majority stake in Kenya’s second largest tobacco company, Mastermind Tobacco (153). PMI reportedly wishes to upgrade Mastermind’s production factory to start making Marlboro cigarettes. Mastermind Tobacco has a presence in eight countries in Africa (154). If the deal goes ahead then PMI will expand its presence on the African continent, which has been, until now, concentrated in North Africa.

3.4.4

Legal challenges opposing effective tobacco control policies

Tobacco companies frequently use legal threats and challenges to derail and delay tobacco control legislation. PMI has a long history of launching legal challenges against governments attempting to introduce policies to reduce tobacco use. In 2014, the company outlined its intention to continue with this strategy (Figure 3.20).

In the last decade alone, PMI has made well over a dozen legal challenges against proposed packaging legislation (including graphic health warnings and plain packaging), point of sale advertising bans, and bans on additives and flavorings in tobacco products (Figure 3.21). The company has pending legal challenges in Brazil, Colombia and India and has even launched a legal challenge in the Philippines against proposed legislation aiming

to make Balanga a tobacco-free city, the very epitome of smoke-free. If PMI were truly committed to a smoke-free world it would give such proposals its full support.

3.4.5

Undermining the WHO Framework Convention on Tobacco Control

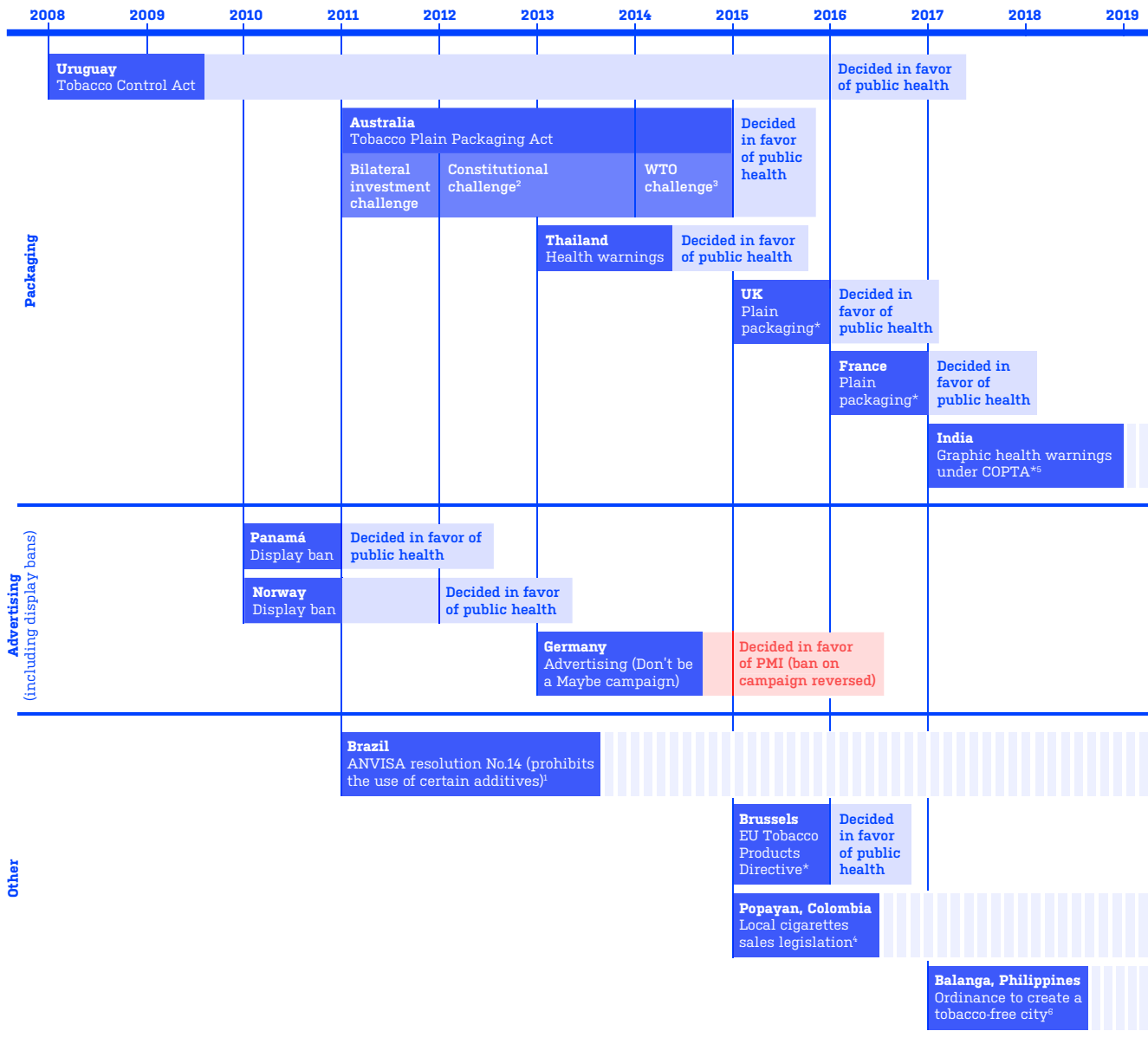
Despite claiming that its smoke-free agenda is compatible with the global public health treaty, the WHO Framework Convention on Tobacco Control (WHO FCTC), PMI has attempted to undermine the treaty and its objectives.

The Philip Morris Files, leaked documents published by Reuters in 2017 (155), reveal that PMI strategically set out to undermine the WHO FCTC in order to protect its profits. Just months before the company announced its intention to “go smoke-free,” government delegations from around the globe were meeting in New Delhi to move forward the implementation of the treaty, which aims to reduce smoking and the damage it causes (156). Just an hour’s drive away from the event, PMI executives set up an operations room and approached delegates covertly to exert influence. As decisions on amendments to the treaty are made unanimously at the conference, only one delegation needs to be influenced in order to thwart progress. In 2016, PMI held secret meetings with a member of the Vietnamese delegation. When asked by Reuters about the meeting, PMI executive Andrew Cave “thumped on the table in a bar at the hotel where company representatives were staying. Reuters should focus, he said, on efforts by the industry to develop so-called reduced-risk product—those that deliver nicotine without the burning of tobacco and which the company says reduce harm” (157).



Figure 3.20. PMI Corporate Affairs Approach and Issues presentation, 2014. Document leaked and published by Reuters.

Figure 3.21: Legal challenges made by PMI, its subsidiaries, and affiliates in the preceding decade



1 Claim by Sinditabaco (PMI is a member)
 2 PMI supported the challenge by BAT
 3 PMI supported the challenges by the Dominican Republic and Honduras
 4 Challenge by Coltabaco (PMI affiliate)
 5 Challenge by Philippine Tobacco Institute (PMI is a member)
 6 Challenge by Godfrey Phillips (PMI Indian affiliate)
 *Joint challenge with other tobacco companies

Data sourced from the Campaign for Tobacco-free Kids Tobacco Control Laws website

3.4.6 Undermining sports sponsorship and advertising legislation

After the WHO FCTC banned all tobacco advertising, promotion and sponsorship in 2005, and with the increasingly global nature of TV coverage and consequent bans on cross-border advertising, companies were forced to remove all cigarette branding at sports events. However, sponsorship of motorsports continued, maintaining opportunities for indirect advertising and cross-promotion throughout the 2000s (158). In 2018, an estimated 352 million people watched F1 races globally (159). From 2018, some tobacco companies adopted a new approach to motorsports' sponsorship (160), with PMI and BAT using corporate mission statements and associated branding to link their "potentially reduced risk" products to Formula One (F1) and

Grand Prix motorcycle (MotoGP) racing teams. Public relations statements from the tobacco companies focus on corporate social responsibility, and technological collaboration and innovation, rather than product brands (160). However, PMI trademarked its Mission Winnow brand not only as a campaign but also as a tobacco product (161), thus revealing the potential that the company may intend to launch a corresponding Mission Winnow tobacco product in the future. Australia has since tightened its tobacco marketing laws to include words or designs closely associated with a tobacco manufacturer, thereby preventing tobacco companies using Mission Winnow or any other associated initiatives (162).

Public Rhetoric vs. Private Activities

PMI's well-funded, publicly facing activities aim to give the impression it has transformed. Meanwhile, behind the scenes, it is business as usual – PMI is maximizing sales of cigarettes, marketing to children, lobbying to secure policies that favor its own interests. Here we juxtapose these public and private activities.



Leaked 2014 PMI documents outline the company's corporate affairs strategy for the next 10 years. PMI's main objective was to

establish PMI as a trusted and indispensable partner, leading its sector and bringing solutions to the table."

PUBLIC RHETORIC & ACTIVITIES

Public Relations

OUR NEW YEAR'S RESOLUTION WE'RE TRYING TO GIVE UP CIGARETTES

Philip Morris is known for cigarettes. Every year, many smokers give them up. **Now it's our turn.** Our ambition is to give up cigarettes in the UK. It won't be easy. But we are determined to turn our vision into reality. There are 7.6 million adults in the UK who smoke. The best action they can take is to quit smoking. Many will succeed. But many will continue to smoke. That's why we want to replace cigarettes with products, such as e-cigarettes and heated tobacco, which are a better choice for the millions of men and women in the UK who would otherwise not stop smoking.

So far, we have invested £2.2bn in research and development, and in making a difference. We've introduced new products in many countries, and millions of adult smokers have abandoned cigarettes and switched to other options.

No cigarette company has done anything like this before. You might wonder how truly mean it is. We do – and we're committed to making these commitments by 2025.

- Launch a website and campaign to provide smokers with information on quitting and on alternatives to cigarettes.
- Offer to support Local Authority cessation services where smoking rates are highest.
- Seek Government approval to insert directly into our cigarette packs, information on quitting and on switching.
- Expand the availability of new, alternative products in the UK.

Quitting smoking – or never starting – is always best. For those who would not otherwise stop, there are better alternatives than switching to e-cigarettes. You will find out more about quitting your usual alternative to smoking at www.smokefreehelp.com/uk

Jan. 2018

PMI campaign launched in 2018
"Our New Year's resolution: We're trying to give up cigarettes"



Oct. 2018

"Hold my Light" Campaign



Oct. 2018

"Change Incorporated" Website + Campaign + Stylist Mag



April 2019

"Unsmoke" Campaign



Sept. 2019

"It's Time" Campaign

Top employer's awards for PMI and all its subsidiaries and equal pay award



Being present at respected global events even when officially excluded, and publicizing this to give impression of acceptability

WEF (Jan. 2019), UNGA (Oct. 2019), CANNES (June 2019) Lions, G20 Summit (June 2019)



Influencing science and claiming public health credentials

Jan. 2019



PMI published a report on public health and called it a "White Paper."



Fund research centers, co-opt public health language, attack independent science

Foundation for a Smoke-Free World launched



PRIVATE ACTIVITIES

Lobbying

2019



PMI reportedly hired former Spanish Prime Minister José Maria Aznar to lobby on its behalf

Company wanted to:

Gain access to markets

Prevent bans

Influence policies

IQOS recommended



Media training for journalists - usually includes "science tours"

Countries or regions targeted include:

Australia

Hong Kong

India

Latin America

New Zealand

U.K.

U.S.

Youth-centric Marketing

Point of sale marketing of combustibles appealing to youth, particularly flavored capsules

Latin America, Colombia (May 2019), Argentina (March-April 2019), etc.

Mar. 2019

Marlboro Mega Blast promotional sales stand at Lollapalooza festival in Buenos Aires



Mar. 2019

Point of sale display of Marlboro cigarettes in Argentina



May 2019

Marlboro flavored capsule variants advertised at point of sale in Colombia



IQOS influencer marketing online social media e.g. Instagram

Focus on Combustibles

500^B
Cigarettes sold in 2017

740^B
Cigarettes sold in 2018

2018

New 2018 Philip Morris cigarette brand launched in Indonesia

2018

March 2018, Bought Costa Rican tobacco companies

2019

January 2019 in negotiation to buy Mastermind Tobacco in Kenya

Fighting Proven Tobacco Control Policies

Fighting against:

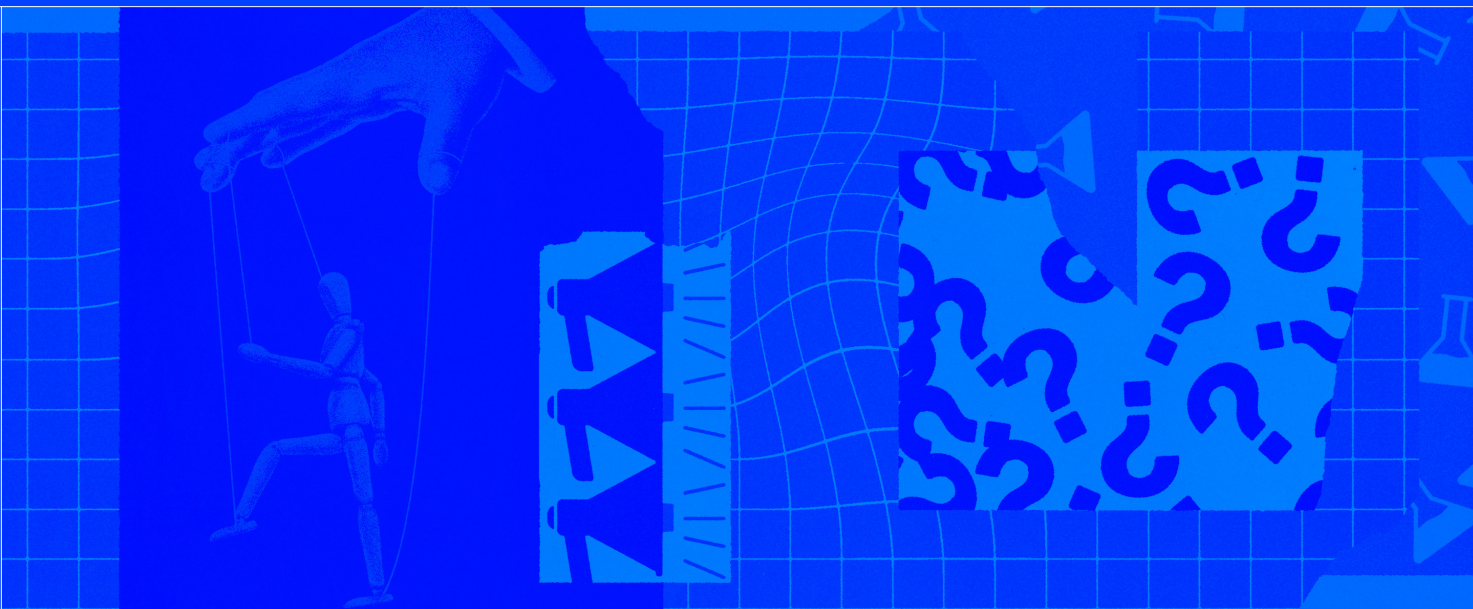
Plain packs

Point of Sale

Additive and flavoring bans

Philippines: legal challenge against Balanga wanting to become a true tobacco-free city





4

In Focus:

What is the Foundation for a Smoke-Free World?

Key Messages

The Foundation appears to embody a long-standing tobacco industry strategy of establishing supposedly independent scientific organizations when it needs to show its products are safe. In the past, those products were cigarettes. Now they are next generation products such as heated tobacco products.

The Foundation is effectively operating as a PR and lobbying arm of PMI, in an effort to relegitimize the company and further its political and financial aims. In its first year, it spent more money on PR activities than on research.

The Foundation for a Smoke-Free World should not be seen as the independent scientific organization it claims to be, but as a tobacco industry front group and an integral part of PMI's corporate affairs strategy.

Like PMI, the Foundation for a Smoke-Free World has promoted tobacco harm reduction strategies of unproven effectiveness, and opposed evidence-based tobacco control interventions.

The Foundation's claims of being an independent, transparent, scientific body; a champion of social justice, and a supporter of tobacco control are not legitimate. Instead, the Foundation is wholly reliant on PMI funding; fails to be transparent; delivers key PR and lobbying functions outlined in leaked PMI's corporate affairs strategy; and working closely with tobacco industry-linked organizations, including PR firms that played a key role in contesting the harms of tobacco.

Robust science certainly is needed on heated tobacco products and harm reduction strategies, but history and the Foundation's conduct to date suggest that neither the Foundation nor its grantees should be the ones making this scientific contribution. Instead STOP researchers have argued that:

"The only appropriate way to utilize the funds the industry clearly has at its disposal for research is through legally mandated tobacco industry financial contributions, as suggested by Cohen and colleagues. If Philip Morris International is really committed to reducing harm from tobacco through robust research, it surely cannot challenge such an approach" (199).

4.1

What is the Foundation for a Smoke-Free World?

The Foundation for a Smoke-Free World (“the Foundation” or “FSFW”) was set up in September 2017, declaring its objective was to accelerate an end to smoking (163). The Foundation is headed by Derek Yach, ex-executive director for Noncommunicable Diseases and Mental Health at the WHO. It describes itself as an independent foundation (164), yet its founder and sole funder is PMI. PMI has pledged to fund the Foundation to the amount of nearly US\$1 billion (US\$80 million annually over 12 years) (165).

4.2

Rhetoric versus reality

The Foundation states its aims are to fund and support “medical, agricultural, and scientific research to end smoking and its health effects and to address the impact of reduced worldwide demand for tobacco” (166). Yet, as outlined below, the evidence suggests that the Foundation is instead an integral part of PMI’s corporate affairs strategy, and the latest in a line of tobacco industry-funded “scientific organizations” founded to bolster the image of the industry and its science (see Table 4). The picture the Foundation paints of itself and its activities does not match the reality. Here, five of its claims are critically examined and the reality exposed.

Claim 1. The Foundation claims to be an independent organization.

Reality: It appears the Foundation may not be working freely from the influence of the tobacco industry.

Rhetoric:

The Foundation describes itself as an “independent, private foundation formed and operated free from the control or influence of any third party” (167). Its president, Derek Yach, is adamant that there are “stringent safeguards in place to ensure the tobacco industry has zero influence over the Foundation’s agenda or research” (168). The Foundation cites (169) work by Joanna Cohen and colleagues, which proposes conditions through which tobacco industry funds may be legitimately used for tobacco control research, to support its claims of independence (170).

Reality:

- According to two independent analyzes of the Foundation’s constitutive documents (171, 172), PMI—still the Foundation’s sole funder at the time of its 2018 tax return—ultimately does have control over the Foundation and its research priorities.
- Cohen and colleagues call for a tax on tobacco companies in order to fund tobacco control research, not for the tobacco industry to create its own scientific bodies. The Foundation appears to be willfully misinterpreting Cohen’s work (173), in order to be seen as independent.
- The decision from the Foundation’s board that it would, in principle, collaborate with ex-tobacco industry employees who “demonstrate expertise in scientific, technical, and clinical areas as well as a commitment to the Foundation’s purposes and strategies” (174) clearly leaves it open to further industry influence.
- The Foundation has already chosen to fund many third parties who have direct historical financial links with the tobacco industry, including PR firms that have played key roles in helping PMI contest the health harms of tobacco (see Table 1). Further, the Foundation’s PR and lobbying efforts in 2018 and 2019 often mimicked those of its funder, suggesting coordination between the two organizations (see Section 4.3).

Claim 2. The Foundation claims to be a scientific organization.

Reality: The Foundation appears to be playing a key public relations role for PMI.

Rhetoric:

The Foundation is attempting to firmly position itself as a research organization. It is funding research within three streams:

1. Health, science and technology (focusing on tobacco harm reduction and smoking cessation) (195)
2. Industry transformation (positioning itself as a watchdog to monitor the tobacco industry through its “Tobacco Transformation Index” (196), formerly known as its “Smoke-Free Index” in partnership with Euromonitor and SustainAbility) (86)
3. Agricultural Transformation Initiative (through which it purports to be addressing declining demand for tobacco crops in countries such as Malawi) (197)

Reality:

The Foundation spent “just \$6.46 million on ‘grants and contributions’ in 2018 – 8% of its \$80 million annual donation from PMI” (198). This figure (which includes all expenditures on science) can be compared to US\$7.59 million on “communications” – most of which went to public relations firms. An analysis by STOP researchers of the Foundation’s 2018 tax return concludes that “this greater expenditure on public relations than on research does not match the picture the Foundation paints of itself as a scientific body but instead supports the growing consensus that the Foundation provides a key public relations function for Philip Morris International” (199).

Moreover, many of the organizations funded under “grants and contributions” appear to be engaged in public relations activities around harm reduction (rather than producing research) – actions in line with the way PMI is promoting its smoke-free vision (see Chapter 3). These include roadshows to promote the Foundation’s “No Fire, No Smoke: Global State of Tobacco Harm Reduction Report 2018” (200); funding of harm reduction magazine, *Filter* (201, 202), and a “summit celebration of knowledge and innovation at the nexus of wellness and a smoke-free world” (176).

The Foundation’s focus on PR activities appears to be exactly in line with PMI’s corporate affairs strategy, as outlined in Chapter 3. Leaked PMI documents outline how the company realized the potential to use harm reduction debates to secure both political and reputational benefits. The idea was to use its next generation products as part of a strategy to “establish PMI as a trusted and indispensable partner...bringing solutions to the table,” an attempt to reclaim a role within, and power over, public health regulation (68). The documents show PMI was troubled about “denormalization” and “demonization” and had identified products such as IQOS as a key way “to support...[the]... normalization” it craved. It also saw opportunities to create “an alliance of credible messengers”; “to find allies that cannot be ignored” (perhaps epitomized by Derek Yach); and to use consultants as “door openers” and “strategists” (67). The Foundation appears to be the realization of these plans.

Table 1. Examples of the Foundation funding third parties previously affiliated with the tobacco industry

Third party	Link to tobacco industry	Link to the Foundation
Legal and accounting firms		
BakerHostetler	Represented tobacco companies including PMI in 2015 in arbitration around the Tobacco Master Settlement Agreement (175).	Had a US\$2.1 million contract with the Foundation in 2018 to provide legal services (176).
EY (Ernst & Young Global Limited)	In 2010, EY stated they worked with “10 out of the 12 tobacco companies listed in the Forbes 2000” (177).	Ernst & Young U.S. LLP listed as auditors in the Foundation’s 2018 tax return (176). In 2018, EY-Parthenon (a brand under which EY member firms provide consultancy services)(178) prepared the Foundation’s “Smoking Cessation Products and Services, Global Landscape Analysis” (179).
Public relations and consultancy organizations		
APCO Worldwide	Ran multiple campaigns for the tobacco industry and founded the front group the Advancement for Sound Science Coalition with Philip Morris in the 1990s, whose purpose was to generate scientific controversy about the link between secondhand smoke and cancer (180).	Was contracted to run the Foundation’s operations in China (with a budget of US\$1.3 million for phase one of a three-phase plan) in 2019 (181).
Ogilvy Public Relations Worldwide (and its subsidiary Feinstein Healthcare)	Worked (in previous incarnations) with Philip Morris since the 1950s to promote tobacco and manufacture doubt about its harms (182).	Had a contract of US\$5.2 million with the Foundation in 2018 (176), and in 2017 was responsible for “website launch, media outreach, stakeholder engagement and global poll development & execution” (279).
Mercury	Worked with Altria (Philip Morris USA’s parent company) in 2018 as its “Washington lobbyist” (183).	Had a contract of US\$664,000 with the foundation in 2018(176) and worked on its press release for World No Tobacco Day (184).
Kantar Public	Part of Kantar, whose subsidiaries include Kantar TNS (which worked with Japan Tobacco International in 2018) and Kantar Media (which worked with British American Tobacco in 2017) (185).	Undertook a “State of Smoking Survey” for the Foundation in 2018 (185).
McKinsey & Company	Advised Philip Morris on its research in the 1950s; worked with Philip Morris USA on marketing in the 1980s, and with PMI and BAT in the 1990s (186).	Undertook a “consulting project” for the Foundation in 2017 (279).
Research organizations		
ECLAT SRL (University of Catania, Italy)	In 2018, its head, Riccardo Polosa, was principal investigator on a EUR 968,000 PMI grant investigating its heated tobacco products (187).	In 2018, ECLAT SRL was funded by the Foundation to create a “Center of Excellence for the acceleration of harm reduction” (CoEHAR) at the University of Catania (42), led by Riccardo Polosa (187).
Centre for Substance Use Research (CSUR)	Between 2017 and 2019, CSUR received funding from PMI, British American Tobacco, Fontem Ventures (a subsidiary of Imperial Brands) and Juul Labs (which is majority owned by tobacco giant Altria) (188).	In 2018, CSUR was funded by the Foundation to develop a proposal for a “Centre of Excellence in behavior research related to smoking cessation” (189).
Rose Research Center	Jed Rose (president and CEO of the Rose Research Center) is also the director of the Center for Nicotine and Smoking Cessation Research (CNSCR) at Duke University, which as of 2012 had received US\$37 million from Philip Morris (190).	In 2019 Jed Rose is named as a grantee in the Foundation’s board meeting minutes (191). The Rose Research Center is conducting research for FSFW on cessation methods and harm reduction (192).
ABF Lab (Analytisch-biologisches Forschungslabor)	Published a paper funded by Imperial Brands in 2017 (193), and in 2019 listed Imperial Tobacco as a funder of a current project (194).	Received funding from the Foundation in 2018 for “Phase 1 Biomarker Research” (176).

Claim 3. The Foundation claims it will be transparent about its scientific activities.

Reality: The Foundation has not been transparent about its scientific activities to date.

Rhetoric:

The Foundation states that it will be transparent about who it is funding. “The Foundation provides...summaries of all grants and programs on its website. The Foundation intends to publish the findings of its grant recipients, sharing the results of such research with the public even if such results are critical of...the tobacco industry” (203).

Reality:

The Foundation’s actions to date have been less than transparent. Until it published its 2018 tax return on its website in May 2019 (as is legally required), the Foundation had provided little information on the site about whom it was funding (see TobaccoTactics page for the information now publicly available on grantees) (189).

Some of the Foundation’s “Centers of Excellence” (see Table 2 and Tobacco Tactics page (269) for more information) have been obscuring their tobacco industry links: For instance the









first three publications from The Centre of Research Excellence: Indigenous Sovereignty & Smoking (COREISS) in New Zealand make no mention of PMI (270-272) [(COREISS did disclose links with PMI in its fourth, a publication (273) co-authored by tobacco industry linked researcher Carl V. Philips (274)].

The website of CoEHAR (the Foundation-funded “Center of Excellence” in Italy) does not list the Foundation as its funder (204). Further, CoEHAR’s head, Riccardo Polosa, repeatedly fails to disclose CoEHAR’s links to the Foundation in his publications (205-209).

These inadequate funding declarations echo the ways in which the tobacco industry has attempted to hide its financial links to research in the past (275).

The Foundation is also failing to be transparent with its other activities. The Foundation did not disclose its financial links to PMI when running science competitions for children through the Conrad Challenge, with the Conrad Foundation confirming they “do not publicly discuss the financial details of sponsor funding” (210).

Table 2. The Foundation for a Smoke-Free World attempts to create research centers: the institutions named in its 2018 tax return (176)

Country	Center or institute	Grantee information
 Greece	Institute for research & innovation on tobacco harm reduction: perceived risk study & intervention of smoke-free products in Greece	Patras Science Park, which has links to the University of Patras, Greece, was listed in the Foundation’s 2018 tax return as the grantee to establish this institute. In 2019, the Foundation listed the “No Smoke Team based in the Patras Science Park” as the grantee (211).
 India	Center of Excellence on Harm Reduction Science	U.S.-based investment group, Metaform Ventures LLC, was listed as a grantee to establish a Center of Excellence in India. The P.N. Srivastava Foundation for Scientific Education and Research (based at North-Eastern Hill University in Shillong, India) was also listed as receiving a grant for a proposal on a Center of Excellence on Harm Reduction Science. As of December 2019, the P.N. Srivastava Foundation is no longer listed as a grantee on the Foundation’s website (212).
 Italy	Center of Excellence for the Acceleration of Harm Reduction (CoEHAR)(213)	“Eclat Srl” at the University of Catania in Sicily is listed as a grantee to create this center, headed by Riccardo Polosa (see Table 1). See TobaccoTactics page on Riccardo Polosa for more information (187).
 Malawi	Center for Agricultural Transformation in Malawi (CAT)	Land O’ Lakes International Development, the charitable arm of a U.S.-based agribusiness corporation, is listed as a grantee to create this center. Further information reveals that “Land O’Lakes, the University of Minnesota, Stellenbosch University and Malawi University of Science and Technology have forged an innovative partnership to establish CAT — a central agricultural hub funded by the Foundation for a Smoke-Free World.”(214)
 New Zealand	Centre of Research Excellence: Indigenous Sovereignty & Smoking (COREISS)(215)	The center, established with funding from the Foundation, is listed as a grantee. Based in Auckland, the center has no university links, and is headed by Marewa Glover. See TobaccoTactics page on COREISS for more information (216).
 Scotland	Centre of Excellence in Behaviour Research-Related Smoking Cessation	The “Centre for Substance Use Research (CSUR) in Glasgow”, also without university links, is listed as grantee, and is headed by Neil McKeganey (see Table 1).
 South Africa	African Centre of Excellence for Smoking and Mental Health	The University of Cape Town’s (UCT) Department of Psychiatry & Mental Health received a grant from May 2018-May 2019 to create this center. STOP understands this grant was awarded to UCT scientist Adele Pretorius, but that the university will not be accepting any further funding from the Foundation.
 USA	Behavioral Psychology Center of Excellence	The Fox Foundation (based in Florida) is listed as grantee to create this center (217).

As of December 2019, half of these centers remain unlaunched. No public announcements have been made from CSUR, North-Eastern Hill University or the Fox Foundation. STOP understands that UCT will not be going ahead with the creation of the African Centre of Excellence for Smoking and Mental Health.

Claim 4. The Foundation claims to be a champion of social justice.

The Reality: The Foundation appears to be the latest tobacco industry-funded organization to hijack issues of justice for PR gains.

Rhetoric:

The Foundation is vocal about its support for several societal groups including individual smokers, women, and tobacco farmers, often framing itself as a purveyor of social justice: “What matters is the real people, struggling every day. From a smoker trying to quit a habit...or a farmer wondering where their next paycheck will come from” (218). Its support of smokers is a recurring theme. When announcing its “Centre of Excellence” in New Zealand, Yach talked of reaching “smokers who are vulnerable and off the beaten track,” saying that the center’s leadership would be “empathizing with the deep needs of people” (219).

The Foundation is also keen to align itself with issues of gender equity (220) and social justice for farmers. As a member of the Aspen Network of Development Entrepreneurs, the Foundation writes that “the work of the Foundation...is to address the needs of the most marginalized people” (221).

Reality:

The tobacco industry’s use of third-party organizations to befriend smokers is nothing new. PMI and other tobacco corporations have, over decades, created smokers’ rights groups in many countries, including the British-based “Freedom Organization for the Right to Enjoy Smoking Tobacco” (Forest), which calls itself “the voice and friend of the smoker” (222).

Tobacco industry actors framing themselves as champions of social justice for marginalized groups is, again, far from novel. They have invoked the rhetoric of empowerment of marginalized groups as a way to sell their deadly products, for example through marketing of menthol cigarettes to African-American men “linking smoking to meanings of fairness and upward mobility” and conceptualizing cigarettes as emancipatory “torches of freedom” for women (223, 224). The Foundation-funded COREISS in New Zealand, with its focus on “Indigenous Sovereignty and Smoking” has already drawn intense criticism from indigenous public health leaders who argue that PMI is using the Foundation to meet its own agendas, which are “in stark contrast to the health and well-being agendas of indigenous peoples” (225).

In the past, tobacco industry actors created the International Tobacco Growers’ Association, which outwardly professed to represent the needs of tobacco growers, yet whose actual purpose is to act as a lobbying arm of the tobacco industry (226). PMI has historically been a member of another such group, the Eliminating Child Labour in Tobacco Growing Foundation (ECLT) (227). Yet research suggests that tobacco industry involvement in efforts to tackle child labor is motivated by the need for good public relations rather than social change, and is used to distract public attention away from the low wages and low tobacco prices that the industry pays in countries such as Malawi (228). Indeed, in PMI’s leaked documents from 2014, it identifies its “Agricultural Labor Practices” program as part of its “continued effort to support normalization” of the industry (67).

The picture painted by the Foundation about its concern for farmers appears to be the latest incarnation of such public relations efforts. Indeed, academics have argued that the Foundation’s strategy of “seeking footholds with underserved populations” casts it in “hero mode”, enabling it to undermine global tobacco control efforts to delegitimize industry involvement in policymaking networks, and to strengthen PMI’s financial and political clout around both combustible and next generation products (NGPs) (229).

Claim 5: The Foundation claims it is a supporter of global tobacco control measures and that it aims to eliminate smoking.

Reality: The Foundation attempts to undermine global tobacco control efforts.

Rhetoric:

The Foundation has widely proclaimed its support for the WHO FCTC. Addressing WHO's insistence that the Foundation could not be a supporter of the WHO FCTC, Derek Yach stated, "As someone deeply involved in the development of the FCTC.... It is clear the goals and objectives of the Foundation for a Smoke-free World are squarely in line with the FCTC and especially Article 5.3" (230). The Foundation also states that its purpose is to "improve global health by ending smoking in this generation" (164).

Reality:

The Foundation and those it funds have, on multiple occasions, pushed against the WHO FCTC and population-level tobacco control measures. For instance, in June 2019, Ayda Yurekli (principal economist at the Foundation), Yach and Ehsan Latif wrote a rapid response (231) (unpublished, appearing only online) to a BMJ paper within which they challenged existing approaches to tobacco control, promoting the idea that evidence-based, population-level tobacco control policies are insufficient, and that individual-level tobacco harm reduction methods must be the focus of global approaches.

There is overwhelming evidence that tobacco tax increases are effective in reducing tobacco use (232), including evidence that it is the only intervention proven to reduce inequalities in smoking (233, 234). Despite this, on World No Tobacco Day in 2019, Marewa Glover, head of the Foundation's "Centre of Research Excellence" in New Zealand, spoke out against increases in tobacco excise. In line with the tobacco industry argument that higher tobacco taxation is regressive (235), she claimed that such measures would disproportionately affect Māori populations (236). In August 2019, Glover also argued against the proposed ban on smoking in cars in New Zealand, saying (to much derision)(237) that "scientific studies have not proven that exposure to cigarette smoke in the car causes disease" (238).

There is long-standing evidence of PMI's efforts to undermine the WHO FCTC (239), including its latest leaked documents, which outline plans to disrupt the WHO FCTC's governing body, the Conference of the Parties (156). In 2018, during the Eighth Conference of the Parties (COP8), the Foundation-funded report "No Fire, No Smoke—the Global State of Tobacco Harm Reduction 2018" (produced by Knowledge-Action-Change), was launched at a side event in Geneva, with copies distributed to COP attendees and press releases produced in several languages. (200, 240) This report was critical of COP, the WHO FCTC and WHO. It promoted tobacco harm reduction approaches while warning against "insufficient" existing forms of tobacco control and "cumbersome" regulations.



Figure 4.1: Knowledge-Action-Change event at COP 8, October 2018, Geneva. (241)

4.3

PMI and Foundation for a Smoke-Free World alignment

On several occasions PMI (or its subsidiaries) and the Foundation have seemingly synchronized their global and in-country public relations and lobbying activities.

Table 3. Apparent coordination of global and in-country strategies between Philip Morris and the Foundation in 2018 and 2019

Coordinated activity	Detail
Global strategy alignment	
Announcement of funding for market research company	On March 18, 2019, PMI Impact (an anti-illicit tobacco initiative solely funded by PMI) announced it would be funding market research company Euromonitor. On the following day, the Foundation announced it would also be funding the organization (86).
Use of “Unsmoke” branding	PMI’s Unsmoke branding (see Chapter 3) was also used by the Foundation in a promotional video on World No Tobacco Day 2019 (242).
Statements on the need for collaboration	In January 2019, PMI published a statement to coincide with the World Economic Forum in Davos, Switzerland, stating that “anti-tobacco lobbies” and the tobacco industry needed to work collaboratively, to realize a “once in a lifetime opportunity,” saying “we must seize it—and seize it together” (243). In the same month, the Foundation published an open letter to the WHO’s Executive Board, lobbying for the “aligning...[of]...our goals to complement and support the WHO and the FCTC.” The letter talked of an “unprecedented opportunity to give global tobacco control new energy and a new path” which would require “the ability to seize opportunities as we strive to end smoking together” (244).
Funding of the same media outlet	In 2019, both PMI and the Foundation were listed as funders of The Influence Foundation, owner of the online harm-reduction magazine, Filter (245).
Responses to the Eighth Session of the Conference of the Parties to the WHO FCTC (COP8) in Geneva	To coincide with COP8 in 2018, PMI released a position statement arguing for tobacco harm reduction policy interventions and “interaction and consultation” between governments and “producers of emerging tobacco and nicotine products.” (246) Also to coincide with COP8, the Foundation launched its “No Fire, No Smoke—Global State of Tobacco Harm Reduction” report through its grantee, Knowledge-Action-Change, at a COP 8 side event (241).
In-country alignment	
Targeting indigenous Māori people in New Zealand with next generation products	In 2018, the Foundation launched its Centre of Research Excellence: Indigenous Sovereignty & Smoking (COREISS), and in 2019, the head of the center, Marewa Glover, argued that higher tobacco taxes would punish Māori, saying, “The compassionate thing to do would be to free up access to risk-reduced alternatives.” (236) Following this, Philip Morris New Zealand has targeted the Māori population by offering discounted next generation products (247).
Lobbying for weaker regulation of next generation products in Hong Kong	In April 2019, Philip Morris Asia submitted evidence to the Hong Kong government arguing against a ban on next generation products (248). The Foundation-funded Knowledge-Action-Change also submitted evidence that argued against a ban (249).

4.4

History repeats itself: the Foundation is a reincarnation of what has come before

PMI encourages the viewpoint that its influence on science is benign (95), but much evidence points to the contrary. Tobacco industry funding of science does have the power to affect outcomes. In an assessment of the evidence base on passive smoking, it was found that industry-funded research on passive smoking was 88 times more likely than independent science to conclude that it was not harmful to health (250). Further, corporate interests including the tobacco industry have been seen to influence the framing of research questions—driving research agendas “away from questions that are the most relevant for public health” and influencing which public health interventions are considered (251). Now, with not only PMI, but also the Foundation and its grantees focused almost exclusively on harm reduction science, the danger is that research on other key tenets of tobacco control, such as price and taxation, packaging, advertising, and industry interference, will become sidelined.

PMI has often created or used scientific organizations when under threat. In the 1950s PMI and others created the Tobacco Industry Research Committee (TIRC) to create doubt about the harms of smoking (252). In the 1980s, PMI and others launched the Center for Indoor Air Research to produce research to create doubt about the harms of secondhand smoke (253). Fast forward to the present day, and PMI needs to prove its next generation products are safe (see also section 4.5). The similarities between the Foundation and previous Philip Morris–funded scientific organizations suggest the Foundation will play a key role here: different era, different focus...same industry tactics.

Table 4. Philip Morris-funded scientific front groups (Appendix for evidence for this table)

	Tobacco Industry Research Committee	Center for Indoor Air Research	Foundation for a Smoke-Free World
	“a sophisticated public relations vehicle based on the premise of conducting independent scientific research—to deny the harms of smoking and reassure the public”	“officially created ... to act as a coordinating organization for Defendants’ efforts to fraudulently mislead the American public about the health effects of ETS (environmental tobacco smoke) exposure”	“effectively operationalizes PMI’s corporate affairs strategy to further PMI’s business interests, which include the promotion of its heated tobacco products”
Launched	1954	1988	2017
Funded by Philip Morris	●	●	●
Claimed to fund independent science	●	●	●
Recruited renowned scientists/public health leaders to lead the organization	●		●
Formed scientific advisory boards (whose powers were limited or opaque) to imply rigor in grant decision-making	●	●	●
Lawyer involvement in science	●	●	Unclear
Public relations involvement in science	●		●
Disseminated industry messages in the media	●		●
Revealed to be a front group and later disbanded	●	●	

4.5

PMI's direct efforts to show its products are safe

Although the Foundation purports to support independent research on harm reduction, its funder, PMI, has attempted to quash such science, and questions have been raised about the quality of the science PMI undertakes directly (Box 1). This provides further evidence that PMI may once again be skewing research to show its products are safe.

Box 1:

PMI criticizes independent science on NGPs

The first independent peer-reviewed research on PMI's IQOS product "Heat-Not-Burn Tobacco Cigarettes: Smoke by Any Other Name," which was published in a leading medical journal, found that these products produce harmful chemicals similar to smoke (254). Rather than using the usual means of academic critique, PMI's response was to contact the authors' employers, attacking the methods used in the study. The journal editors, clearly shocked by PMI's behavior, called this "pressure to suppress discourse that could hurt commercial interests" (255).

PMI's science questioned by its own scientists

PMI's own science on IQOS has been questioned. In 2017 several former PMI scientists described a "number of irregularities" involving the clinical trials that were being used as evidence to underpin PMI's application to the U.S. FDA concerning registering IQOS as a modified risk tobacco product (81, 256). A researcher who was directly involved in these clinical trials told Reuters she questioned the quality of the researchers and laboratories contracted to carry out the experiments, and that when she had highlighted an irregularity in one of the studies, PMI had excluded her from meetings. Reuters' own investigations found that PMI dropped one experiment because the basic procedure for obtaining informed consent from participants had not been followed. A second investigator submitted urine samples exceeding possible human levels, and a third told the news organization that he "doesn't hold such company-sponsored clinical trials in high regard, describing them as 'dirty' because their purpose is more commercial than scientific" (256).

5

Has the Foundation for a Smoke-Free World Been a Success Up To Now?

Philip Morris International's funding of the Foundation for a Smoke-Free World will amount to nearly US\$1 billion over the Foundation's first 12 years. Shareholders will surely want to see a return for this large investment. The question therefore is, has PMI's funding enabled the Foundation to achieve what it set out to do—to be seen as a successful, independent, scientific organization working to reduce harm from tobacco, rather than a tobacco industry front group? So far, the evidence suggests that this objective has not been met, with growing examples of the Foundation seemingly failing to convince others of its legitimacy. Here we outline what has been going wrong:

Key Message

Despite PMI pledging almost one billion U.S. dollars in funding, the Foundation looks to be failing to gain allies and legitimacy.

Signs the Foundation May Be Failing

	Details
1. Apparent failure to secure additional funders	The Foundation stated at its inception that it is “seeking and expects to receive funding from other sources” and that it would have “much preferred to have a diverse set of other funders in place with no industry funds from the start.”(257) However, its 2018 tax return reveals it is still solely funded by PMI (176). This suggests that the Foundation has either been unable to convince potential additional funders of its credibility and independence, or has decided to remain fully tobacco industry-funded.
2. Apparent failure to spend its funds on science	In 2018, the Foundation reported a US\$47.45 million underspend (out of the US\$80 million from PMI) (176). This may suggest it is struggling to find researchers and research organizations to accept its tobacco industry funds. It did spend US\$6.46 million on “grants and contributions” (a category that includes grants for research but also other, non-research-related grants). Yet in the same year the Foundation spent more—\$7.6 million—on “communications,” the majority of which was spent on PR companies (198).
3. Difficulty in securing research relationships with credible tobacco control scientists	Several credible researchers have turned down funding offers from the Foundation. This includes tobacco control and development experts. Perhaps due to this apparent lack of success in recruiting experts to conduct its science and represent it publicly, the Foundation has turned to scientists previously funded by PMI, such as Riccardo Polosa, who heads the Foundation’s “Center of Excellence for Harm Reduction” (CoEHAR) at the University of Catania in Italy (and who accepted a grant of nearly 1 million Euro from PMI in 2018 to investigate its heated tobacco products)(187) and grantee the Centre for Substance Use Research (CSUR) which, in the past three years has received funding from PMI, BAT, Fontem Ventures (a subsidiary of Imperial Brands) and Juul Labs (which is majority owned by tobacco giant Altria) (188).
4. Difficulty in finding credible journals to publish its science	The Foundation had planned to publish a special issue of a journal titled “15 years after the Framework Convention on Tobacco Control’s Adoption: Time for Greater Urgency and Focus”, in the International Journal of Environmental Research and Public Health (258). However, in October 2019, once the journal’s managing editors realized that the Foundation was funded by the tobacco industry, they withdrew the special issue.
5. Grantees cutting ties	In July 2019 it was announced that one of the Foundation’s 2018 grantees, BRAC in Bangladesh, would be returning its funding (259). Further, public relations organization, Ogilvy which had a contract with the Foundation in 2017-18 has also announced that it no longer works with the Foundation, partly “to avoid any conflict with its health clients” (260). The University of Cape Town received a grant from the Foundation in 2018, but due to pressure from university staff, announced it would not be accepting further funding (261). Consequently, the Foundation’s planned “African Centre of Excellence for Smoking and Mental Health” will not be launched at the university.
6. Key staff losses	In its first two years of operation, the Foundation has had a notably high staff turnover, losing eight key members of staff including four members of the board, its chief operating officer; chief health, science and technology officer; and vice president of marketing and communications (175).
7. Cancellation of events	In 2019, the Foundation contracted think tank SustainAbility to hold stakeholder meetings for its upcoming “Smoke-free Index” (a proposed resource, which co-opted the name of an existing, independently-funded Smoke-free Index (262), and has now been renamed the “Tobacco Transformation Index”) (196). Of these handful of meetings (with four going ahead in Poland, Brazil, Japan and the U.K.), two were canceled – one by the government in Turkey, and one (which was due to take place in Thailand) canceled by SustainAbility themselves, due to lack of interest from potential attendees, with reports that “the academic community in Bangkok had already prepared to boycott the event” (263). In 2017, one of the Foundation’s first meetings was due to be held at the Wellcome Trust (WT) in London, but WT canceled the meeting once the nature of the booking became clear (264).
8. Negative press coverage	Despite the millions the Foundation has spent on PR, according to an academic analysis, in the Foundation’s first six months of operation, only 20% of news articles framed it in a positive light. Press during that time primarily framed the Foundation’s mission with “doubt, scepticism, and disapproval” (265).
9. Backlash against its New Zealand grantee	The Foundation’s COREISS in New Zealand has drawn intense criticism from indigenous public health leaders (225). COREISS’s head, Marewa Glover, gave oral evidence to the New Zealand Health Select Committee in August 2019, arguing against a ban on smoking in cars (238). Since then, outcry against Glover’s position on tobacco regulation as well as the Foundation’s funding of her center has grown. For example, Hāpai te Hauora, the body that holds the tobacco control contract with the New Zealand Ministry of Health has stated it will not work with Glover, saying her “source of funding leaves it no choice but to cut ties” (266).
10. Rejection by global public health community	In September 2017, the month of the Foundation’s inception, WHO released a statement saying that “WHO will not partner with the Foundation. Governments should not partner with the Foundation and the public health community should follow this lead” (267). In 2019, hundreds of global public health experts also called for governments and the public health community to reject collaboration with the Foundation (268).

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Appendix

Evidence for Table 4 in Chapter 4 - Philip Morris-funded scientific front groups

	The Tobacco Industry Research Committee (TIRC) (renamed Council for Tobacco Research - CTR - in 1964)	The Centre for Indoor Air Research (CIAR)	The Foundation for a Smoke-Free World (FSFW)
Critique	In the 1998 lawsuit "United States v. Philip Morris" Judge Gladys Kessler stated that the TIRC was: "a sophisticated public relations vehicle based on the premise of conducting independent scientific research - to deny the harms of smoking and reassure the public." (1)	On 29 January 2003, the U.S. Department of Justice stated in court documents that the "CIAR was officially created ... to act as a coordinating organization for Defendants' efforts to fraudulently mislead the American public about the health effects of ETS (environmental tobacco smoke) exposure" (2).	"FSFW effectively operationalizes PMI's corporate affairs strategy to further PMI's business interests, which include the promotion of its heated tobacco products" (3).
Launched	1954	1988	2017
Funded by Philip Morris	Yes - The Tobacco Industry Research Committee was founded by several tobacco companies, including Philip Morris (4).	Yes - CIAR was formed by Philip Morris, R.J. Reynolds Tobacco Company and Lorillard Corporation (5).	Yes - In September 2017 the Foundation for a Smoke-Free World was founded, with a pledged \$960 million from Philip Morris International (6).
Claimed to fund independent/objective science	<p>Yes - "The industry stated publicly that it was forming the TIRC to fund independent scientific research to determine whether there was a link between smoking and lung cancer. However...the TIRC was actually formed for public relations purposes, to convince the public that the hazards of smoking had not been proven" (5).</p> <p>Its research topics included cancer and heredity, infection, nutrition and hormones, but rarely conducted or supported research on tobacco (1).</p>	<p>Yes - it claimed its mission was "to create a focal point organization of the highest caliber to sponsor and foster quality, objective research in indoor air issues including environmental tobacco smoke" (ETS) (5).</p> <p>In the late 1980s the tobacco industry was under pressure to respond to growing concerns about secondhand smoke. It set up CIAR to look at "indoor air quality" rather than secondhand smoke or "environmental tobacco smoke," and to "expand interest beyond the misplaced emphasis solely on environmental tobacco smoke" (2).</p>	Yes - the Foundation states it is "an independent, nonprofit organization" that "will fund research, promote innovation and support collaborative initiatives to accelerate progress in reducing harm and deaths from smoking" (7).
Recruited renowned scientists/public health leaders to head organization	Yes - Clarence Cook Little, who had previously headed the American Society for Cancer Control, was hired as scientific director of TIRC (8)		Yes - Derek Yach, the Foundation's President, was previously Executive Director for Noncommunicable Diseases and Mental Health at the WHO (9)
Formed scientific advisory boards (whose powers were limited or opaque) to imply rigor in grant decision-making	Yes - A scientific advisory board (SAB) ostensibly evaluated research and made funding decisions, but "although the independence of the SAB was widely publicized [its] work was directed by the full-time staff of the TIRC." By 1958 the SAB was "disturbed by a misunderstanding of the relationship between the TIRC and the SAB" and felt they were in an "awkward position of unwittingly endorsing everything that the TIRC said" (10)		Yes - the Foundation states it has a Science and Technology Advisory Council (STAC). As of November 2019 it had not listed these members (though subsequently to this, as of February 2019, FSFW had listed five members, two of whom were existing FSFW grantees) (12). One of these members, Jed Rose, has previous financial links to Philip Morris (see body of report for details). It is unclear how much power this group has.
Lawyer involvement	Yes - "Though the TIRC/CTR had a science advisory board, all grant applications were first filtered by CTR lawyers for litigation purposes" (13) Further, "lawyers were not only involved in selecting projects for funding but also in designing the research and disseminating the results" (5)	Yes - In 2003 the U.S. Department of Justice outlined that within CIAR, "lawyers specifically engineered and constructed scientific studies to get results that would be useful for public relations, litigation and legislative battles" (2)	<p>Baker & Hostetler, which represented tobacco companies including PMI in 2015 in arbitration around the Tobacco Master Settlement Agreement, had a contract with FSFW in 2018 worth US\$2.1 million, and the Foundation stated that the law firm had offered them "guidance and input". (6)</p> <p>However, it is unclear what this entailed, and whether the Foundation's research program has been influenced or managed by this organization or other legal firms.</p>

	The Tobacco Industry Research Committee (TIRC) (renamed Council for Tobacco Research - CTR - in 1964)	The Centre for Indoor Air Research (CIAR)	The Foundation for a Smoke-Free World (FSFW)
Public relations involvement	Yes - PR firm Hill & Knowlton was instrumental in founding the organization: "it was Hill who hit on the idea of creating an industry-sponsored research entity" (4).		Yes - in May 2019 it was revealed that the Foundation is working with APCO to "establish and operate the Foundation in China" (14). In 2018 the Foundation employed Kantar Public (part of Kantar) to produce its State of Smoking Survey (15). PR group McKinsey undertook a "consulting project" for the Foundation in 2017 (16). All these firms have a history of working with Philip Morris (see Table 1 in Chapter 4 of main report).
Disseminated industry messages in the media	Yes - In 1954 "The Frank Statement" was published in 448 U.S. newspapers. It launched the TIRC publicly, and claimed that there was insufficient evidence that smoking caused cancer (1).		Yes - in 2018 the Foundation funded Filter Magazine to produce content on tobacco harm reduction (17).
Revealed to be a front group and later disbanded?	Yes - In 1998 as part of the Master Settlement Agreement the TIRC/CTR was ordered to be disbanded (1).	Yes - in 1998 as part of the Master Settlement Agreement the CIAR was ordered to be disbanded (1).	

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