



ABPI Highlights Review 2015

Aileen Thompson, Executive Director, Communications

April 2016

ABPI – a voice for industry



The ABPI represents innovative research-based biopharmaceutical companies, small, medium and large. Our members supply the majority of branded medicines used by the NHS, and are researching and developing over two thirds of the current medicines pipeline, ensuring that the UK remains at the forefront of helping patients prevent and overcome diseases.

The ABPI is recognised by Government as the industry body negotiating on behalf of our members and the branded pharmaceutical industry in relation to the Pharmaceutical Price Regulation Scheme. The ABPI is also consulted on content and changes to the statutory scheme alternative.

Working together with members we provide a strong voice, ensuring that members and industry are heard through advocacy and engagement with key stakeholders including policy makers, government and regulators to ensure that the pharmaceutical industry is recognised as a key sector for the UK economy and positioned as a partner in the wider healthcare system.

We keep members informed and up to date with policy briefings and updates, supporting engagement at the highest levels on all the key issues.

2015 in numbers



11 publications produced



81  press releases and statements issued

14 PPRS/Medicines Optimisation Roadshows with NHS England



Over 7,000  Twitter followers

28  blogs posted

23 meetings in Wales

47 in Northern Ireland

29 in Scotland

£1 billion

paid to Government by industry under the Pharmaceutical Price Regulation Scheme (PPRS)

69  meetings held with stakeholders in England

 86% of members think the ABPI always or often provides a high quality of service

Contents



- A word from the President
- A word from the new CEO
- ABPI Board of Management
- ABPI Senior Leadership Team (2015)
- 2015 Achievements
- The Devolved Nations – Wales, Scotland and Northern Ireland
- NHS Partnerships
- Therapy Groups
- Membership Survey
- Conferences and Events
- Publications and Media Engagement
- Membership List

A word from the President



“ I am proud to lead an organisation of such dedicated and talented colleagues, working together to really make a difference for our members, but ultimately for the patients we serve.

2015 was a successful year for the ABPI and has laid the foundations for future success. 2016 will be another challenging year, but I'm confident that we have the right team in place, including our new CEO, to meet these head on.

”

John Kearney

A word from the ABPI's new CEO

– in post 1 March 2016



The pharmaceutical industry has an outstanding track record of delivering real innovation to both the NHS and to patients. Our significant role within life sciences also helps underpin the UK's position as a scientific superpower. Yet current trends show real challenges in sustaining these benefits across the UK today.

So whilst enormously proud to take up this leadership role, I also take it up with a real commitment to work with all stakeholders to reverse these trends and ensure that everyone can access the multi-faceted benefits which accrue through the impact of this critical, research-based, innovative industry.



Mike Thompson

ABPI Board of Management (as of 31.12.2015)



Bayer
Alexander Moscho



ABPI
John Kearney



Pfizer
Erik Nordkamp



Eli Lilly
Jean-Michel Cossery



BMS
Johanna Mercier



AstraZeneca
Lisa Anson



Janssen
Mark Hicken



Abbvie
Matt Regan

ABPI Board of Management (as of 31.12.2015)



MSD
Mike Nally



Eisai
Nick Burgin



GSK
Nikki Yates



Alliance
Pete Butterfield



Actelion
Robin Bhattacharjee



UCB
Steve Turley



Sanofi
Tarja Stenvall

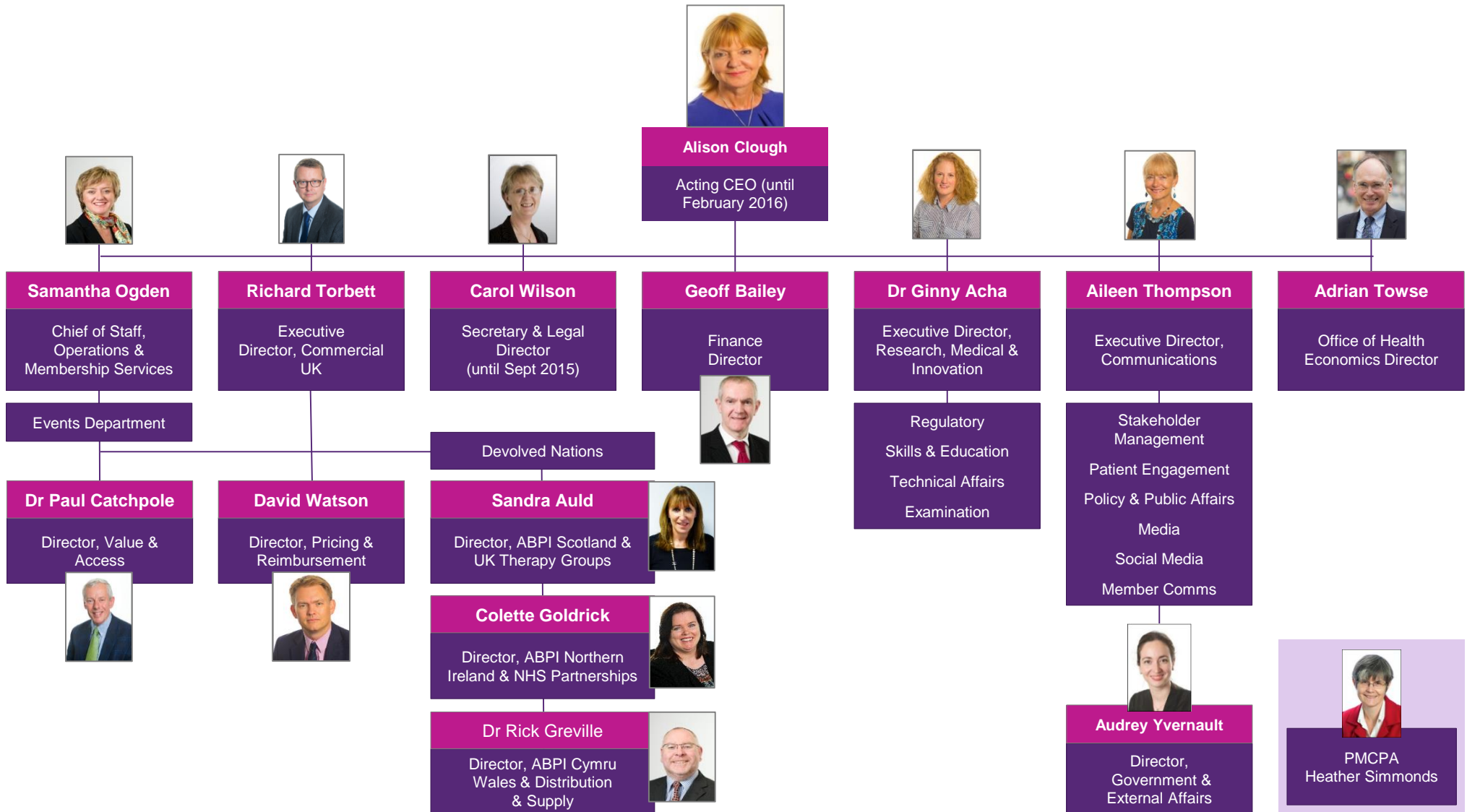


Amgen
Charlotte Galvin



Novartis
Hugh O'Dowd

ABPI senior team structure (1 January to 31 December 2015)



2015 Achievements



2015 Achievements



We said we would “*improve the commercial environment in the UK, building on the platform of the Pharmaceutical Price Regulation Scheme (PPRS)*”

We...

- Made clear we recognised the tough environment of UK austerity, debt and rising healthcare costs; the low and slow uptake of newer medicines; the fact that the UK has the lowest prices in Europe; the importance of the life sciences industry and research & development to the UK economy; and the stability required for the longer term for both industry and Government.
- Made sure that companies have the freedom to choose price at launch; that growth in the medicines bill (with exclusions) was underwritten by industry at agreed rates; that the National Institute for Health and Care Excellence (NICE) Quality-Adjusted Life Year (QALY) threshold was maintained; and that we secured commitments on the uptake including the Medicines Optimisation programme. NICE reform was in the Labour manifesto and greater use of new cost-effective medicines in the Conservative manifesto.
- Gained clarity on **PPRS** commitments, which will be monitored by the Medicines Access Group, and we estimate that circa £3billion will be paid by industry scheme members to the Department of Health.
- Submitted a full response to the Statutory Scheme consultation on behalf of industry.

2015 Achievements



We said we would “*improve the commercial environment in the UK, building on the platform of the Pharmaceutical Price Regulation Scheme (PPRS)*”

We...

- Helped shaped the Terms of Reference of the **ACCELERATED ACCESS REVIEW (AAR)**; agreed industry secondment; advocated for a Stakeholder Reference Group enabling us to receive earlier information for the ABPI and our members and an additional platform for engagement. We were central to the co-ordination of industry input.
- Were commended by the Government on our willingness to engage as well as on the quality of our contribution to the Accelerated Access Review (AAR) Interim Report. The NHSE Mandate now contains a measurable objective to improve uptake and implement the Accelerated Access Review recommendations.
- Set up a joint **SPECIALISED COMMISSIONING GROUP** with NHS England and received positive member feedback on priority areas and engagement.
- Successfully requested that the **LIFE SCIENCE COMPETIVENESS INDICATORS** include an uptake indicator and gained a commitment to improving this indicator for the next publication.

2015 Achievements



We said we would “*improve the commercial environment in the UK, building on the platform of the Pharmaceutical Price Regulation Scheme (PPRS)*”

We...

- Completed Phase 1 of the **PPRS/Medicines Optimisation programme** – with 14 joint roadshows in each AHSN; drafted the final Roadshow report; agreed the engagement plan. Planning for Phase 2 is under way.
- Worked closely with NHS England, the National Institute for Health and Care Excellence (NICE) and charities on a sustainable solution to the **CANCER DRUGS FUND**.
- Produced a **COMPREHENSIVE CONTACT PROGRAMME** covering Government, NHS England, NICE and patient groups.
- Ensured our **NHS PARTNERSHIP TEAM** continues to develop relationships with key regional NHS bodies and to develop industry policy with regional industry groups.
- Gained in-principle agreement on the need for **NICE REFORM** both with industry and with NICE leadership. Our high-level industry proposal was agreed with the Board of Management and engagement is now progressing.

2015 Achievements



We said we would *“improve the UK environment for research, development and manufacturing and raise the profile of our membership in UK science and innovation”*

We...

- Achieved strong collaboration with the **ACCELERATED ACCESS REVIEW (AAR)** team, through delivering three constructive workshops for the industry.
- Addressed the challenges of **TRANSPARENCY** of industry by continuing the LiveWire analysis. Our joint study, published in May 2015, showed that since 2009 the disclosure rate of industry-sponsored clinical trials at 12 months has steadily improved year-on-year from 71% in 2009, to 81% in 2010, 86% in 2011 and 90% in 2012 – indicating that the pharmaceutical industry is achieving disclosure in a timely manner more consistently than ever before.
- Are now founder members of the Health Research Authority (HRA) Transparency forum, and we established an ABPI Task & Finish group to improve patient and investigator understanding of compensation arrangements, as prompted by concerns from HRA, to deliver standard wording and training for investigators.

2015 Achievements



We said we would *“improve the UK environment for research, development and manufacturing and raise the profile of our membership in UK science and innovation”*

We ...

- Strengthened expert group engagement with the Farr Institute (new Asthma project under way) and participated in the Ministerial Industry Strategy Group **HEALTH DATA** project. The ABPI has also joined the IMI Big Data for Better Outcomes project. We delivered a well attended and impactful forum with the Academy of Medical Sciences on Real World Evidence and produced a report.
- We were pivotal in bringing together the UK’s **MEDICINES MANUFACTURING INDUSTRY PARTNERSHIP (MMIP)**, which has delivered eight case studies on the work of MHRA Innovation office; progressed discussions with the Treasury on fiscal incentives; developed with the Knowledge Transfer Network (KTN) a digital community platform for the MMIP and manufacturing base; and commissioned the Office for Health Economics (OHE) to produce relevant indicators on impact and value of manufacturing.
- Enhanced the **DEVELOPMENT/REGULATORY ENVIRONMENT** by engaging with Medicines and Healthcare products Regulatory Agency (MHRA), NICE and the Department of Health (DH) to improve the Early Access to Medicines scheme (EAMS); by producing publications and engagement supporting the 3Rs in animal research, including a members’ guide to the Concordat; and by successfully negotiating for facilitated regulatory progresses with MHRA and across industry associations.

2015 Achievements



We said we would “*improve the UK environment for research, development and manufacturing and raise the profile of our membership in UK science and innovation*”

We...

- Built **THOUGHT LEADERSHIP ON INNOVATION IN MEDICINES** by holding our successful Research & Development (R&D) conference in November, with positive feedback from participants and media; by successfully launching the **Adapting the Innovation Landscape: UK Biopharma R&D Sourcebook 2015** at the conference, already in broad use and well recognised by stakeholders; and by growing media outreach and broad representation across stakeholders across the UK (including the Devolved Nations).
- Launched and progressed the Department of Health (DH) working group to address a sustainable business model for **ANTIMICROBIAL RESISTANCE (AMR)** with continued commitment from DH. We also successfully linked ABPI efforts on AMR with the International Federation of Pharmaceutical Manufacturers and Associations (IFPMA), Pharmaceutical Research and Manufacturers of America (PhRMA) and the European Federation of Pharmaceutical Industries and Associations (EFPIA), given our ability to co-ordinate action with the O’Neill AMR team, leading to better outcomes from the O’Neill team for the global proposals around AMR.

2015 Achievements



We said we would *“improve the UK environment for research, development and manufacturing and raise the profile of our membership in UK science and innovation”*

We...

- Established clear position statements for advocacy and policy summits on **OFF-LABEL AND CROSS-LABEL USE OF MEDICINES** and worked with UK partners to align/ communicate positions as well as EFPIA Actions shaped by two Parliamentary bills (Access to Medical Treatments, Off-Patent Drugs) in 2015. The Off-Patent Bill did not pass the Committee stage and therefore was withdrawn, while the Access to Medical Treatments bill passed through the House of Commons and House of Lords and received Royal Assent.
- Delivered an NHS England multi-stakeholder brochure on **BIOSIMILARS** that respects our core biosimilar policy principles; established the new National Biosimilar Forum, chaired by Keith Ridge, Chief Pharmaceutical Officer, NHS England; consulted and shaped biosimilar policies in Scotland and Wales; negotiated with NICE to improve their Evidence Summary for infliximab and Key Therapeutic Topics review; intervened to correct inappropriate biosimilar metrics, with a commitment for NHS to adopt an appropriate set of indicators agreed with the British Generic Manufacturers Association (BGMA) and the ABPI in early 2016.

2015 Achievements



We said we would *“improve the UK environment for research, development and manufacturing and raise the profile of our membership in UK science and innovation”*

We...

- Published our skills report, **Bridging the skills gap in the biopharmaceutical industry**, in November 2015.
- Created e-learning to support ABPI exam candidates.
- Added new A-level topics to the schools pages on our website, which has helped increase the number of visitors to the site by 50% compared to 2014.

2015 Achievements



We said we would “*improve the perception of the industry in the eyes of our stakeholders*”

We...

- Focused our **ADVOCACY AND ENGAGEMENT PRIORITIES** on AAR, NICE reform, Cancer Drugs Fund evolution, PPRS including the PPRS/ Medicines Optimisation programme, input to industry positions for Board of Management, Medicines Access Group, Ministerial Industry Strategy Group (MISG) and the clinical Short Life Working Group (SLWG) development of stakeholder plans for MMIP, members’ guide on animal research.
- Produced and implemented high-level **STAKEHOLDER ENGAGEMENT CONTACT PROGRAMMES** (ABPI, Acting CEO and new President) covering new Parliament, new Government and devolved nations.
- Widened the **BREADTH OF STAKEHOLDERS** to include patient groups and charities, in particular around the CDF, and maintained high levels of engagement with Government as well as with new MPs, including chairs of relevant committees.
- Provided **ENGAGEMENT OPPORTUNITIES** for members with Government departments as well as NICE.

2015 Achievements



We said we would “*improve the perception of the industry in the eyes of our stakeholders*”

We...

- Launched a new **ALL PARTY PARLIAMENTARY GROUP FOR LIFE SCIENCES** to an oversubscribed event and engaged with influential scientific networks.
- Arranged 56 **EXTERNAL MEETINGS** with the Acting CEO; stakeholders across Government.
- Sponsored the **GUARDIAN HUSTINGS** event, engaging with 300 NHS England attendees and panel of three Ministers; hosted two joint party conference breakfasts in October with Life Sciences UK (LSUK) with Ministers and MPs; and launched the 2015 Westminster Flu Day in November with 103 MPs and Peers.
- Identified the need for a Board-led focused **COMMUNICATIONS WORKING GROUP** to champion and support the development of the Value Story programme, holding the ABPI accountable for delivery of the Story, the Communications programme and operational plan to build our industry’s reputation, scaling up in 2016.

2015 Achievements



We said we would “*improve the perception of the industry in the eyes of our stakeholders*”

We...

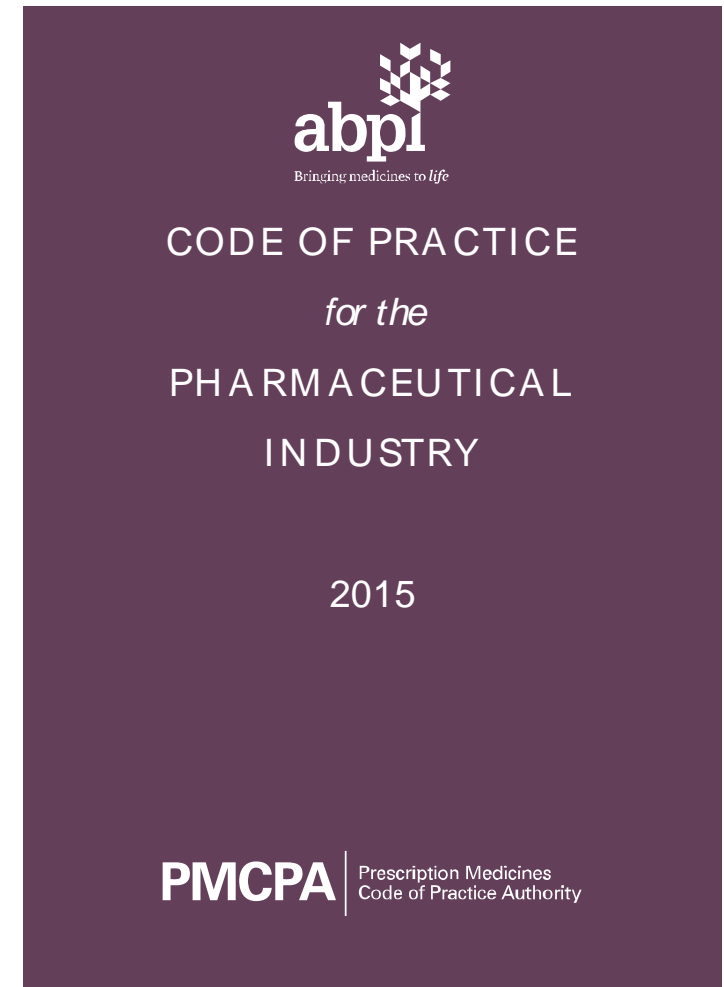
- Led the **DISCLOSURE WORKING GROUP** to drive the operational plans for the HCP (Healthcare Professional) database on disclosure which launches in June 2016.
- Procured two specialist IT solutions providers who developed both the Disclosure UK portal and database.
- Began implementing a multifaceted communications engagement plan to inform media coverage within targeted publications; delivered presentations to stakeholders at national conferences; and held informative discussions and presentations with members, medical societies, professional bodies and medical Royal Colleges.
- Worked closely with EFPIA to ensure alignment; developed and implemented phase 1 of the stakeholder engagement plan, working with the ABPI Research Medical & Innovation team; worked with NHS England and DH to understand the impact of the DH’s proposed Sunshine Rule.



ABPI Code of Practice for the Pharmaceutical Industry



- The 2015 ABPI Code included the fact that the required disclosures of transfers of value from pharmaceutical companies would be made available on a central database in 2016.
- The template to record data is available on the PMCPA website.



2015 Achievements



We said we would “*improve the perception of the industry in the eyes of our stakeholders*”

We...

- Led specific advocacy and engagement with partners in the science community and LSUK ahead of the **COMPREHENSIVE SPENDING REVIEW** to secure protection and enhancement of the Science R&D budget, including a letter to *The Times* from the All-Party Parliamentary Group for Life Sciences. We partnered with the Confederation of British Industry (CBI) to galvanise support for the Science budget in the Treasury, the Department for Business, Innovation & Skills (BIS), the Department of Health and across the wider public.
- Supported the launch of the ABPI Skills Report with advocacy and media relations.
- Developed and launched a joint Patient Organisation Forum & ABPI Patient Guide in collaboration with National Voices.

ABPI in the Devolved Nations



ABPI Cymru Wales 2015 – Access to Medicines



ABPI Cymru Wales has continued to work in collaboration with the All Wales Medicines Strategy Group (AWMSG), taking a pivotal role in the ongoing evolution of Health Technology Appraisal processes in Wales.



All Wales Medicines Strategy Group
Grŵp Strategaeth Meddyginiaethau Cymru Gyfan

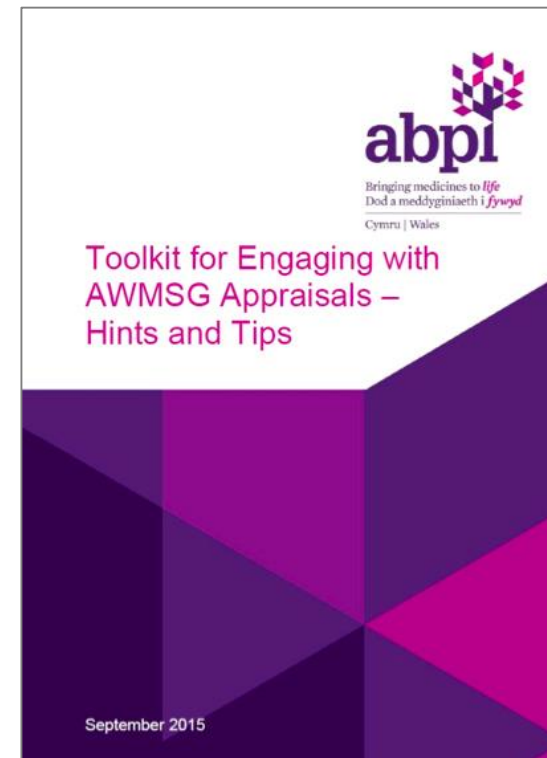
**Process for appraising orphan and ultra-orphan medicines
and medicines developed specifically for rare diseases**
Effective from September 2015

The *Improving access to medicines for Patient Cohorts – ‘One Wales’ Interim Commissioning Process*, published in December, aims to ensure consistency in the identification and funding of medicines suitable for defined patient cohorts, where the medicine is not already routinely available for prescription within NHS Wales.



**All Wales Therapeutics
and Toxicology Centre**
Canolfan Therapiwteg a
Thocsicoleg Cymru Gyfan

Improving access to medicines for Patient Cohorts
‘One Wales’ Interim Commissioning Process



Collation of the evidence around the adoption of positive AWMSG and NICE guidance by Health Boards in Wales via an Implementation Dashboard has formed part of the agenda for monthly meetings with officials from the Welsh Government and led to the instigation of work to identify and share best practice with the All Wales Chief Pharmacists Group.

ABPI Cymru Wales 2015 – Collaboration



“Prudent Healthcare demands a new relationship with industry, less directed on buying products, but focused on the delivery of outcomes for patients. This new way of working is predicated on increasing healthcare value through improved patient outcomes, patient experience and resource efficiency, and reflects a shift from focusing on the volume of activity and procedures delivered. We want to drive improved patient outcomes and create a more efficient NHS; prudent healthcare is central to achieving that. Pharmaceutical companies such as those represented by the ABPI are key partners for NHS Wales in making this happen.” –

Vaughan Gething, AM – Deputy Minister for Health, Welsh Government

Bevan Commission

...promoting health and health services improvement in Wales

The Bevan Commission recognises that alongside its own experts it will need to draw upon the wider expertise and support of other professionals, organisations and industry to ensure that it is fully able to provide the best advice to the Welsh Government. That is why in 2015 a Memorandum of Understanding was signed between the Commission and the ABPI.

ABPI Cymru Wales
Bulletin
AUTUMN 2015 Edition 12
abpi
Bringing medicines to life
Dod a meddygiaeth i fywyd
Cymru | Wales

Bringing medicines to life
Dod a meddygiaeth i fywyd
Life Sciences Hub
Cymru | Wales

Special Edition

Opportunities in Austerity conference – 10 November 2015

In partnership with the Bevan Commission and Welsh NHS Confederation, ABPI Cymru Wales held a conference, *Opportunities in Austerity* in early November, highlighting the greater collaboration between the pharmaceutical industry and the NHS.

Chaired by Professor Trevor Jones, an ABPI Trustee and member of the Bevan Commission, the day was formally opened by Vaughan Gething AM, Deputy Minister for Health. In his address to delegates he outlined the Welsh Government's approach to greater joint working:

“Prudent Healthcare demands a new relationship with industry, less directed on buying products, but focused on the delivery of outcomes for patients. This new way of working is predicated on increasing healthcare value through improved patient outcomes, patient experience and resource efficiency, and reflects a shift from focusing on the volume of activity and procedures delivered. We want to drive improved patient outcomes and create a more efficient NHS; Prudent Healthcare is central to achieving that. Pharmaceutical companies such as those represented by the ABPI are key partners for NHS Wales in making this happen.”

Over the following pages, you will find brief outlines of the presentations from the day. These are just a snapshot of the work being undertaken across the UK between the pharmaceutical industry and the NHS.

THE WELSH NHS CONFEDERATION
CONFEDERATION IWSG CYMRU

Bevan Commission
Promoting health and health services improvement in Wales

Page one

ABPI Cymru Wales 2015 – Innovation



We collaborated with Cancer Research UK and Genetic Alliance UK to provide a series of education events across the Assembly to explain the role of stratified medicines and their important contribution to improving and sustainable healthcare.



2016 manifesto
our agenda for change

abpi
Bringing medicines to life
Dud a meddygimaeth i fywyd
Cymru | Wales

The biopharmaceutical sector in the UK invests more in R&D than any other business sector and provides the greatest Gross Value Added (GVA) per employee. The medicines it develops and produces change the lives of millions of patients. These medicines are at the forefront of treating the nation's biggest killers and managing the chronic diseases that are one of NHS Wales's greatest challenges.

Government support and positioning of the life sciences sector is crucial to this and there is a common consensus between political parties in Wales of the importance of the life sciences industry to the Welsh economy and the health of Wales' population. We have warmly welcomed this recognition and have supported recent Welsh Government initiatives such as the prioritisation of life sciences under the Sêr Cymru and National Research Network initiatives.

Measures such as the creation of the Life Sciences Sector Panel have met with widespread support from across party divides and within the pharmaceutical industry. Similarly, the opening of the Life Sciences Hub Wales to act as a focal point for the sector in Wales, stimulating interaction, innovation, networking and collaboration, has been both a symbolic and a practical step forward that the ABPI has been keen to encourage.

As a sector with long investment and product cycles, stability and certainty is particularly important to encouraging and maintaining investment in the UK against the backdrop of an increasingly competitive global environment.

Accelerating the life sciences strategy

We want to see continuation and further development of the life sciences strategy approach, with accelerated success in delivering locally, the aims that have been set out nationally. This means:

- Continuing the development of a conducive environment for the pharmaceutical industry to carry-out its business in Wales, supported by an integrated economic and health policy.
- Creating an "Office for Life Sciences", under a joint Ministerial portfolio, formally bringing together various Welsh Government departments and agencies, including NHS Wales, and ensuring aligned incentives, reporting and accountability.

The ABPI Cymru Wales manifesto for the 2016 National Assembly for Wales elections is available on our website.

ABPI Cymru Wales Oncology Therapy Group published a survey of consultant oncologists and haematologists working in Wales. The outcomes clearly identified clinicians' grave concerns around inequity in access to the latest cancer medicines, and gaps in planning across Wales for the next generation of innovation, including stratified medicines.

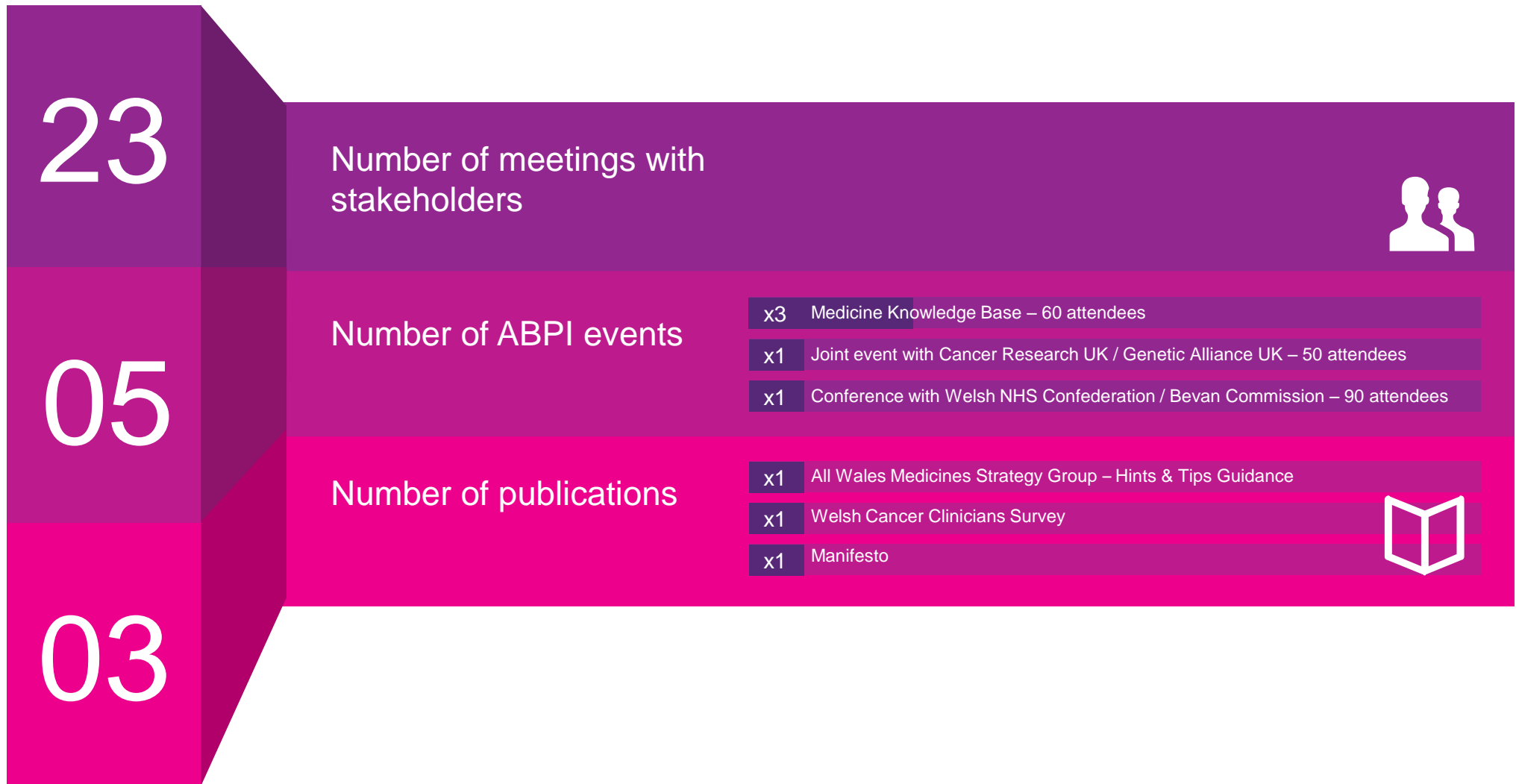
1 | Page

Oncology & Haemato-Oncology Consultants Views and Perceptions on Access to New Medicine Technologies - Wales

A report for ABPI Wales Cymru Oncology Therapy Group

February 2015

WALES in numbers



23

Number of meetings with stakeholders



05

Number of ABPI events

- x3 Medicine Knowledge Base – 60 attendees
- x1 Joint event with Cancer Research UK / Genetic Alliance UK – 50 attendees
- x1 Conference with Welsh NHS Confederation / Bevan Commission – 90 attendees

03

Number of publications

- x1 All Wales Medicines Strategy Group – Hints & Tips Guidance
- x1 Welsh Cancer Clinicians Survey
- x1 Manifesto



ABPI Scotland 2015 – Profile raising



• National Research Scotland Conference

- Launch of the NRS Research Strategy.
- Session on strengthening links with the industry, chaired by ABPI Research, Medical and Innovation Director Dr Ginny Acha, and with presentations from Catherine Matonti, GlaxoSmithKline's Field Team Manager for UK R&D, and Graham Welton, Development Feasibility Manager, Amgen. Attended by ABPI Scotland Director Sandra Auld.
- The conference was opened by the Minister for Sport, Health Improvement and Mental Health Jamie Hepburn MSP.



• ABPI Scotland lecture delivered by Sir John Arbutnott, the eminent UK scientist and public servant

- Lecture and dinner attended by over 50 ABPI members and stakeholders from across the Scottish health community at the Royal Society of Edinburgh.

• Therapy Groups

- Five ABPI Scotland therapy groups continue to promote collaborative working and raise the industry's profile with stakeholders.

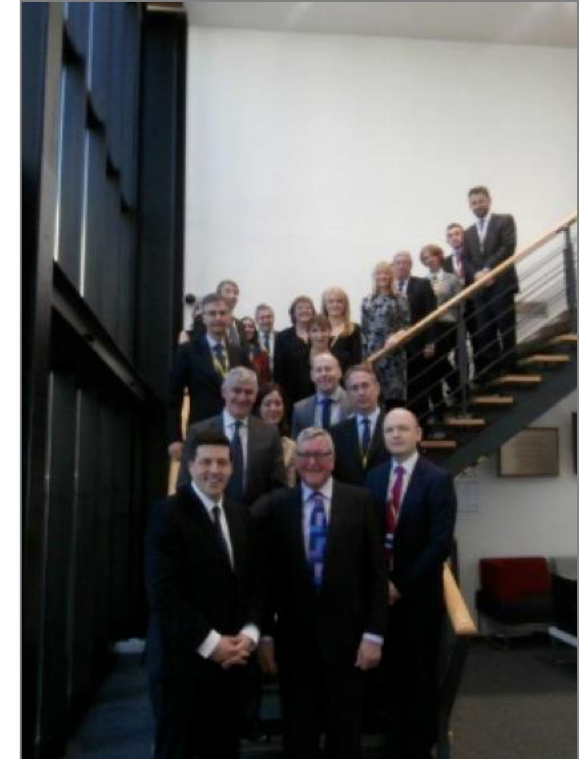


ABPI Scotland 2015 – Policy and Politics



- **Political and policy stakeholder engagement:**

- Six-monthly meetings with the Cabinet Secretary for Health, Shona Robison MSP
- Meeting with the Minister for Business, Fergus Ewing MSP
- Meeting with Scottish Government special adviser
- Regular meetings with key stakeholders in NHS boards, Healthcare Improvement Scotland and Scottish Government
- Engaged with three of the four major parties on their manifestos for the 2016 Scottish elections
- Hosted informal dinners at Scottish Labour and Scottish National Party conferences



- **Securing policy change:**

- Driving the implementation of the changes in SMC process
- Driving continued change with new medicines review
- Early engagement pilot with SMC for companies
- Companies attending PASAG for complex submissions
- ABPI attendance at SMC Independent Review Panels
- Continued attendance at PACE
- Attendance at Prescription for Excellence Reference Group
- Continued engagement with the Scottish Government's life sciences advisory board, Life Sciences Scotland (LSS)


SCOTLAND in numbers





Therapy Group Achievements in 2015:

- **Respiratory** – Series of workshops for community-based nurses developed in partnership with the Royal College of Nursing
- **Diabetes** – Series of workshops to support community pharmacists in delivering medicines. Reviews for people with diabetes held in partnership with a number of key stakeholders
- **Neurology** – Inappropriate generic substitution by pharmacists of epilepsy medicines addressed. Progress towards achieving equity of access to epilepsy specialist services by NI patients
- **Immunology** – Development of NI Inflammatory Bowel Disease Pathway in partnership with stakeholders and dissemination of successful 2014 Biologics Waste reduction project across NI and into GB
- **Pain** – Chronic Pain recognised as a condition in its own right for commissioning purposes
- **Cardiovascular** – Series of Patient Safety workshops for community pharmacists held in partnership with the Health and Social Care Board
- **Cancer** – As a result of three years of consistent effort, Health & Social Care Minister commits to reforming the NI Individual Funding Request (IFR) process to allow equity of access to specialist medicines for NI patients



“ Involvement with the NIHLF has proved to be one of the best ways for us as students to get into dialogue with the people who lead and manage the healthcare system. ”

Martin King Chair

Northern Ireland Healthcare Leadership Forum
Queen's University Belfast 2014
University Road Belfast,
BT7 1NN,
Northern Ireland,
UK.
email: healthcareleaders@qub.ac.uk



NORTHERN IRELAND LIFE SCIENCES



CLINICAL INNOVATION CONFERENCE



Strategic Working Groups:

Innovation — Second highly successful NI Clinical Innovation Conference delivered in collaboration with other key stakeholders and resulting in recognised benefits to the health and wealth of Northern Ireland – over 250 delegates attended

Partnership — Establishment of Health Policy Forum think tank with Royal College of General Practitioners, Royal College of Nursing, Age NI, (NHS confederation in NI) and the Patient Client Council. Also, academic outreach programme of support for emerging clinical leaders

NORTHERN IRELAND in numbers



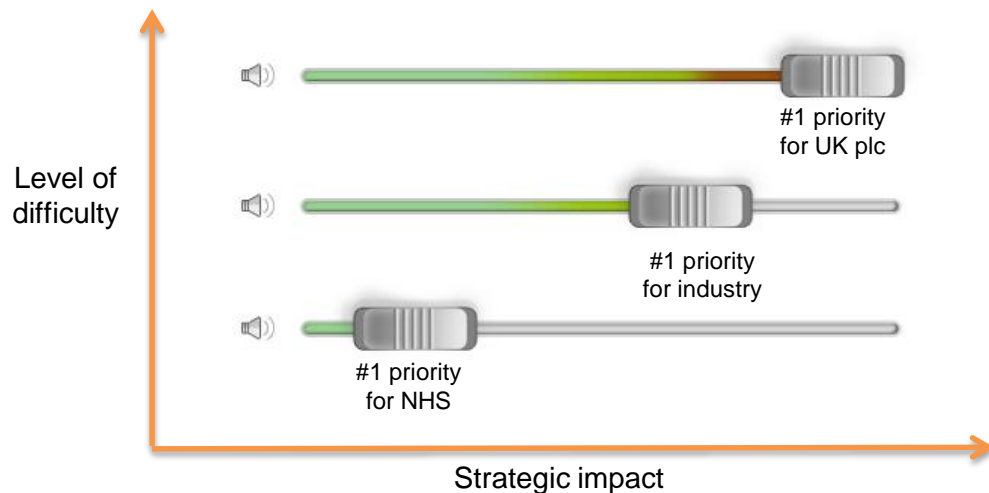
NHS Partnerships



The ABPI vision for NHS Partnerships



- **Demonstrate clear value from partnership activities to members and NHS in a climate of diminishing resources on both sides by:**
 - Connecting work in regions clearly to national NHS/ industry priorities to create a compelling national ‘story’
 - Supporting the delivery of in-year efficiency contributions alongside longer-term strategic goals in order to build credibility
 - Focusing on doing ‘fewer things well’ with the right stakeholders at the right levels – both in the system and in our member companies
 - Disinvesting from all partnership activity which does not have measurable triple wins for patients, industry and NHS
 - Distilling activities into three priority areas of focus:



Visionary initiatives that contribute to sustainable system reform which delivers better health for the UK population and sets international benchmarks

Strategic initiatives that accelerate uptake of innovation to improve patient outcomes

Operational initiatives that contribute to NHS in-year efficiency agenda, providing there is clear commitment to reinvest savings in innovation to improve outcomes

What will this look like in practice ?

Priority 1: Position UK as international leader in healthcare system change

- Vanguard sites, devolution models and Academic Health Science Networks (AHSNs) provide opportunities to generate innovative, holistic, population-based healthcare delivery models
- Industry not currently capitalising on the opportunities these present
- Potential to improve UK drawdown of EU funding streams through provision of resource to develop cross-sector projects that demonstrate impact of innovation in approach and delivery
- Steal from best global practice to help put UK on the map for system change via connections with member companies' global parents – e.g. bring the Stanford self-management chronic disease management model to Manchester

NHS Stakeholders engaged: NHS England national leadership; NHSE regional leadership teams; vanguard teams; AHSNs, National Clinical Directors, Strategic Clinical Network Leads, Clinical Reference Groups, Regional Directors of: Information, Commissioning, Finance, Medical and Operations/ Delivery

Members engaged: Board of Management, UK General Managers; Heads of Europe / US partnership function leads



Bringing medicines to *life*



#1 priority
for UK plc

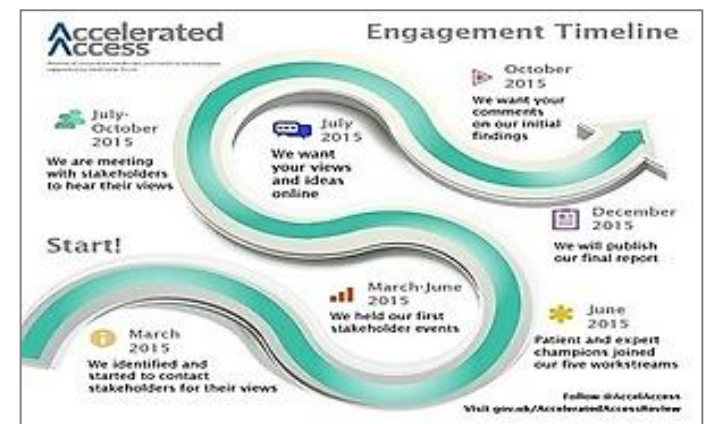
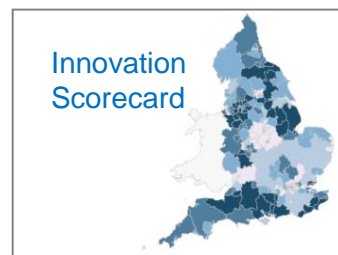


Priority 2: Accelerate adoption of innovation



- Remit confined to environment-shaping activities:
 - Implementing national AAR conclusions (when available) regionally
 - Innovation Scorecard: work with NICE and local stakeholders to reduce variations

Stakeholders engaged: DH; NICE; AAR Implementation Team; regional NHS leadership teams; Clinical Commissioning Group (CCG) leads, AHSNs, National Clinical Directors, Strategic Clinical Network Leads, Clinical Reference Groups, Regional Directors of: Information, Commissioning, Finance, Medical and Operations/ Delivery



Innovation Scorecard Origin

Innovation Health and Wealth Report (IHW) Dec 2011

- To work with industry to publish better innovation uptake metrics, and more accessible evidence
- To reduce variation, and drive greater compliance with NICE guidance
- To establish a better delivery mechanism for diffusion
- To align incentives to reward and encourage innovation
- To set clearer priorities and local accountability for innovation
- To mandate the adoption of high impact innovation

“We will develop and publish a straightforward **Innovation Scorecard**, designed to track adoption of NICE Technology Appraisals at local level”

Bringing medicines to *life*

INNOVATION HEALTH AND WEALTH

Priority 3: Delivering in-year Medicines Optimisation efficiencies

- Acknowledge customer reality: NHS must find £12bn via in-year efficiencies by 2020 to secure additional Government funding commitment
- Align with 'Right Care' Initiative – key NHSE priority
- Partnership initiatives must ensure 'the right medicines for the right patient'. MISG PPRS objectives are reflected in plans across industry, NHSE, AHSNs and other stakeholders
- Avoid piecemeal approach by agreeing waste reduction/ adherence improvement goals at most senior levels with NHSE, NHS Wales, Scotland, NI (working with Devolved Nations)
- Develop and implement regional partnership initiatives which deliver in-year benefits in waste reduction and improved adherence
- Aggregate and communicate outputs nationally – demonstrate that industry is contributing 'at both ends' to NHS priorities

NHS Stakeholders engaged: NHSE national leadership (CPO); NICE; MHRA; Regional Clinical Leads, Regional Pharmaceutical Officers, CCG leadership CCG leads, AHSNs, National Clinical Directors, Strategic Clinical Network Leads, Clinical Reference Groups, Regional Directors of: Information, Commissioning, Finance, Medical and Operations/ Delivery

Members engaged: Regional teams
Bringing medicines to *life*



Therapy Groups



Therapy Group 2015 Achievements



PDI (Diabetes)

- Launch: Snapshot Report
- Response to NICE Guidance and 2nd NICE Guidance
- Response to QIPP Consultation ABPI / HSCIC QIPP Workshop
- Define quality principles – commission economic impact study - develop expert clinical network – NHSE Engagement & pilot optimal care pathway
- Delivery of Diabetes Expert network

RI (Rheumatology)

- Launch: RAising the Game
- Report
- Continued stakeholder engagement & communication of key messaging

POI (Oncology)

- POI PHE collaboration in progress
- HTA Evaluation Methodology Research: 1 piece published Mar 2015, another report produced and awaits publication following seminar
- Age is not a Barrier to Chemotherapy project collaboration has resulted in partners publishing findings

DI (Dermatology)

- New group established
- Stakeholder Engagement & Development of key messaging which have led to pursuit of a Clinical led Dermatology task force
- Scoping activity for DI Impact Study

VHI (Viral Hepatitis)

- New group established
- Stakeholder Engagement & Development of key messaging
- Development of a Group Hep C leaflet

Vaccines

- Engagement within the DH cost effectiveness review meetings
- Westminster Flu Day
- Development of value of vaccines messages

SAFI (Stroke in Atrial Fibrillation)

- Development of 1 year on report
- Continued stakeholder engagement & communication of key messaging

PMHI (currently Mental Health – to be renamed Neuroscience & remit to include Dementia)

- Medicines Optimisation group met with NHS England, DoH, Royal Colleges and ABPI to create a steering group. The group is focusing on schizophrenia
- Partnership with NHS Clinical Commissioners Group. Input into work streams and have a presence at their meetings

ABPI Membership Survey



Membership Survey



- **94%** of members said we were always or often **professional** compared to 90% in 2014
- **82%** of members said we were always or often **quick to respond** compared to 77% in 2014
- **86%** said we were always or often **well-informed** compared to 83% in 2014
- **86%** said we always or often **provide a high quality of service** compared to 83% in 2014

‘Opted for “improve a little” because as with last year I think that the quality of services is excellent so little needed to be improved upon’

‘More regular updates and information sharing has been very useful and appreciated’

– **98%** said services had either improved or stayed the same

Conferences and Events



Annual Conference 2015



The Affordability Conundrum

- On 23 April 2015 the ABPI hosted its annual conference which focused on the critical issues of cost, value and affordability of medicines.
- Speakers included:
 - Jonathan Emms, ABPI President and UK Managing Director, Pfizer
 - Stuart Dollow, founder of Vermillion Life Science Ltd
 - Dr Richard Torbett, Chief Economist, EFPIA
 - Mark Flannagan, Chief Executive, Beating Bowel Cancer
 - Prof. Adrian Towse, Director, OHE
 - Eric Lowe, Chief Executive, Myeloma UK
 - Lisa Anson, President – UK & Ireland, Astra Zeneca
 - Mark Hicken, Managing Director – UK & Ireland, Janssen
 - Dr Paul Robinson, Executive Director, MSD
 - Sofia Wallström, Director General, the Dental and Pharmaceutical Benefits Agency
 - Prof. David Webb MD, Consultant Physician and Toxicologist at the Royal Infirmary of Edinburgh
 - Simon Wootton, Chief Operating Officer, North Manchester CCG
- It was hosted by BBC presenter Fiona Bruce, who appeared in front of 250 delegates.



R&D Conference 2015 – Solving the Innovation Conundrum



- On Wednesday 11 November 2015 the ABPI hosted its annual conference on research and development, *Solving the Innovation Conundrum*, at the Royal College of Physicians in London.
- With guest speakers from the biopharmaceutical industry, regulatory and healthcare organisations, the conference raised the question of how to maximise research & development productivity with an ever-increasing amount of innovation in the life sciences sector.
- The event was attended by over 180 delegates, and keynote speakers included Dr Roger M Perlmutter, Executive Vice President and President of MRL, Merck & Co. Inc.'s global R&D organisation; Dr Mene Pangalos, Executive Vice President of AstraZeneca's Innovative Medicines and Early Development Biotech Unit, and Professor David Roblin, Chief Operating Officer and Director of Translation at the Francis Crick Institute.



ABPI Events



Guardian Hustings: 300+ attendees, panel made up of two Ministers and one Shadow Minister



APPG for Life Sciences: ABPI led launch, 90+ stakeholders, Minister for Life Sciences spoke



Two joint party political conference breakfasts: Minister for Life Sciences, four MPs and two Shadow Ministers spoke



Westminster Flu Day: 103 MPs and Peers attended, social media reach over 20k

Publications and Media Engagement



ABPI Publications



The ABPI produced 11 publications during 2015, ranging from research reports to industry information and guidelines.

In addition to our publicly-available publications, the ABPI provides a number of regular member-only publications including the Government Affairs Report and the weekly media update.

All of the ABPI's public reports are available to download from the publications library on our website: <http://www.abpi.org.uk/our-work/library/Pages/default.aspx>

Some of the key publications of 2015 include:

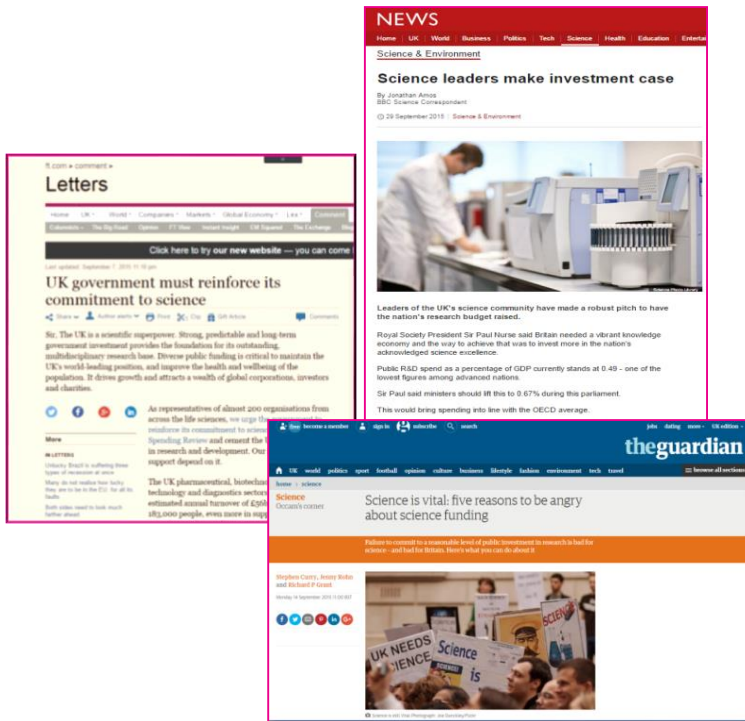
- *Adapting the Innovation Landscape: UK Biopharma R&D Sourcebook 2015*
- *Bridging the skills gap in the biopharmaceutical industry – 'Skills Report'*
- *Members' guide to the Concordat on Openness on Animal Research in the UK*
- *Homecare: a good practice guide for pharmaceutical manufacturers*
- *Working collaboratively on the NHS What is a Biosimilar Medicine?*



ABPI in the media



Members of the ABPI senior leadership team took part in a number of high-profile broadcast appearances. These included interviews on Radio 4's Today programme, Channel 4 News and BBC World. The ABPI also secured many pieces of press coverage in both the traditional and trade media.



BBC Radio 4 - Today, 8 Sept 15
Mishal Husain interviewing Alison Clough



Membership List



<p>A. Menarini Farmaceutica Internazionale S.r.l. www.menarini.com</p> <p>AbbVie Limited www.abbvie.co.uk</p> <p>Actelion Pharmaceuticals UK Limited www.actelion.com</p> <p>Alexion Pharma UK Limited www.alexionpharm.com</p> <p>Alimera Sciences Limited www.alimerasciences.com</p> <p>ALK-Abello Limited www.alk-abello.net</p> <p>Allergan Limited www.allergan.co.uk</p> <p>Alliance Pharmaceuticals Limited www.alliancepharma.co.uk</p> <p>Almirall Limited www.almirall.com</p> <p>Amgen Limited www.amgen.com</p> <p>Astellas Pharma Limited www.astellas.com</p> <p>AstraZeneca Plc www.astrazeneca.com</p> <p>Bausch & Lomb UK Limited www.bausch.com</p> <p>Bayer Plc www.bayer.co.uk</p>	<p>BGP Products www.abbottuk.com</p> <p>Biogen Idec Limited www.biogenidec.com</p> <p>BioMarin Europe Limited www.bmrn.com</p> <p>Boehringer Ingelheim Limited www.boehringer-ingelheim.co.uk</p> <p>Bristol-Myers Squibb Pharmaceuticals Limited www.bms.com</p> <p>Celgene Limited www.celgene.com</p> <p>Chiesi Limited www.chiesi.uk.com</p> <p>Chugai Pharma Europe Limited www.chugai.co.uk</p> <p>Daiichi Sankyo UK Limited www.daiichi-sankyo.co.uk</p> <p>Daval International Limited www.davalinternational.com</p> <p>Eisai Limited www.eisai.co.uk</p> <p>Fresenius Medical Care (UK) Limited www.fmc-ag.com</p> <p>GlaxoSmithKline Plc www.gsk.com</p> <p>Grunenthal Limited www.grunenthal.co.uk</p>	<p>Ipsen Developments Limited www.ipсен.ltd.uk</p> <p>Janssen www.janssen.co.uk</p> <p>Leo Pharma www.leo-pharma.com</p> <p>Lilly (Eli Lilly and Company Limited) www.lilly.co.uk</p> <p>Lundbeck Limited www.lundbeck.co.uk</p> <p>Merck www.merckserono.net</p> <p>Merck Sharp & Dohme Limited www.msd-uk.com</p> <p>Mitsubishi Tanabe Pharma Europe Limited www.mt-pharma-eu.com</p> <p>Napp Pharmaceuticals Limited www.napp.co.uk</p> <p>Novartis Pharmaceuticals UK Limited www.novartis.co.uk</p> <p>Novo Nordisk Limited www.novonordisk.co.uk</p> <p>Orion Pharma (UK) Limited www.orionpharma.co.uk</p> <p>Otsuka Pharmaceutical Europe Limited www.otsuka-europe.com</p> <p>Pfizer Limited www.pfizer.co.uk</p>	<p>Pierre Fabre Limited www.pierre-fabre.com</p> <p>Quintiles UK www.quintiles.com</p> <p>Rosemont Pharmaceuticals Limited www.rosemontpharma.com</p> <p>Sanofi Limited www.sanofi.co.uk</p> <p>Santen UK Limited www.santen.eu</p> <p>Servier Laboratories Limited www.servier.co.uk</p> <p>Shionogi Limited www.shionogi.co.jp/index_e.html</p> <p>Shire Pharmaceuticals Limited www.shirepharmaceuticals.co.uk</p> <p>Sunovion Pharmaceuticals Europe Limited www.sunovion.eu</p> <p>Takeda UK Limited www.takeda.co.uk</p> <p>UCB Pharma Limited www.ucb.com</p> <p>ViroPharma Limited www.viropharma.com</p> <p>Warner Chilcott Pharmaceuticals UK Limited www.wcrx.com</p>
---	---	--	--

ABPI Highlights Review 2015

*Aileen Thompson, Executive Director, Communications
and Corporate Affairs, April 2016*



The Association of the British Pharmaceutical Industry

A company limited by guarantee registered in England & Wales number 09826787

Registered office: 7th Floor, Southside, 105 Victoria Street, London SW1E 6QT

Tel: +44 (0)207 930 3477

getintouch@abpi.org.uk

ABPI Cymru Wales

Floor 4, 2 Caspian Point, Pierhead Street, Cardiff Bay CF10 4DQ

Tel: 0207 930 3477

ABPI Northern Ireland

The Mount, 2 Woodstock Link, Belfast BT6 8DD

Tel: 0207 930 3477

ABPI Scotland

3rd Floor Crichton House, 4 Crichton's Close, Edinburgh EH8 8DT

Tel: 0207 930 3477