

EU Council for Health Research

Bio-pharmaceutical Industry Perspective

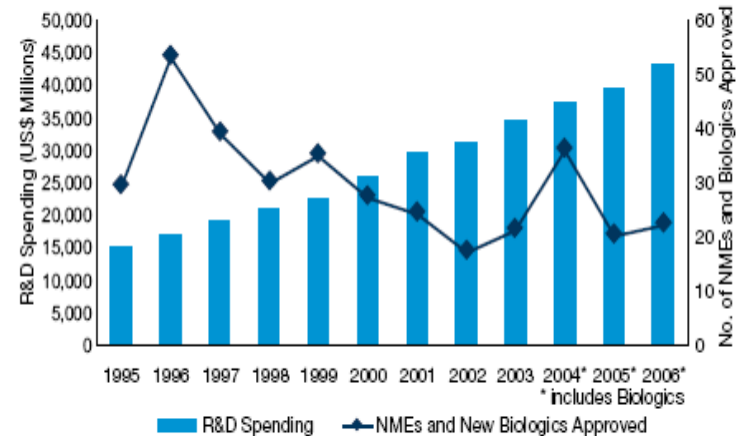
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- **Productivity:** Cost of developing new drugs increasing; number of new medicines stagnating
- **Investment:** Pharmaceutical incentive systems and profitability under pressure
- **Innovation:** Personalized Medicine a reality, but progress in basic science not yet translated to medical innovation and patient benefit

R&D spending has soared but number of NME's has been constant



Sources: FDA/CDER Data, PhRMA data, PricewaterhouseCoopers analysis
 Note: Data on R&D spending for non-PhRMA companies are not included here, because they are not available for all 11 years

| Healthcare | Science |
|--|---|
| <ul style="list-style-type: none"> • Healthcare challenges are global <ul style="list-style-type: none"> ➤ WHO list of priority diseases based on total disease burden • Industrial R&D is global <ul style="list-style-type: none"> ➤ European research must address global problems • Research outcomes not reliably translated into clinical practice <ul style="list-style-type: none"> ➤ Health and research policies are disconnected and fragmented | <ul style="list-style-type: none"> • Disease biology poorly understood <ul style="list-style-type: none"> ➤ Few new targets, biomarkers • Evolving interaction between biology and lifestyle/environmental factors • Regulatory guidelines and HTA barriers not aligned |

What's missing in EU?

1. Translate healthcare research into medical practice
2. Prioritise areas of healthcare-related research
3. Ensure sustained support and investment for innovation through collaboration/partnership
4. Provide EU-wide recommendations on best healthcare practices based on scientific evidence
5. Monitor performance of national health care systems against best practice recommendations

Partnership, prioritisation and translation are critical

... an important step forward if:

- Sustainable, impactful, free from short-term political pressure
- Unique, comprehensive and differentiated remit
- Driven by excellent science, not political correctness
- Focused on a **limited** number of objectives which address global healthcare challenges
- Effective bridge between scientists, regulators, health authorities and other influential stakeholders

... a missed opportunity if:

- An 'instrument' rather than a sustainable body
- Limited to a co-ordination role
- Driven only by fundamental research
- Europe-centric rather than health-centric