



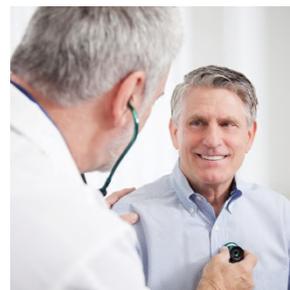
European Federation of Pharmaceutical  
Industries and Associations



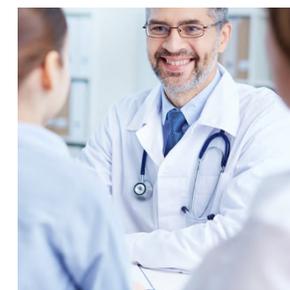
## What's after IMI2?

# Translational research power - Health PPP today (IMI) and tomorrow

Author: Nicolas Creff Date: 3 September 2019 Version: 1



**Presentation**  
Health Tuesday: IMI Innovative Medicines  
Initiative – What's New?



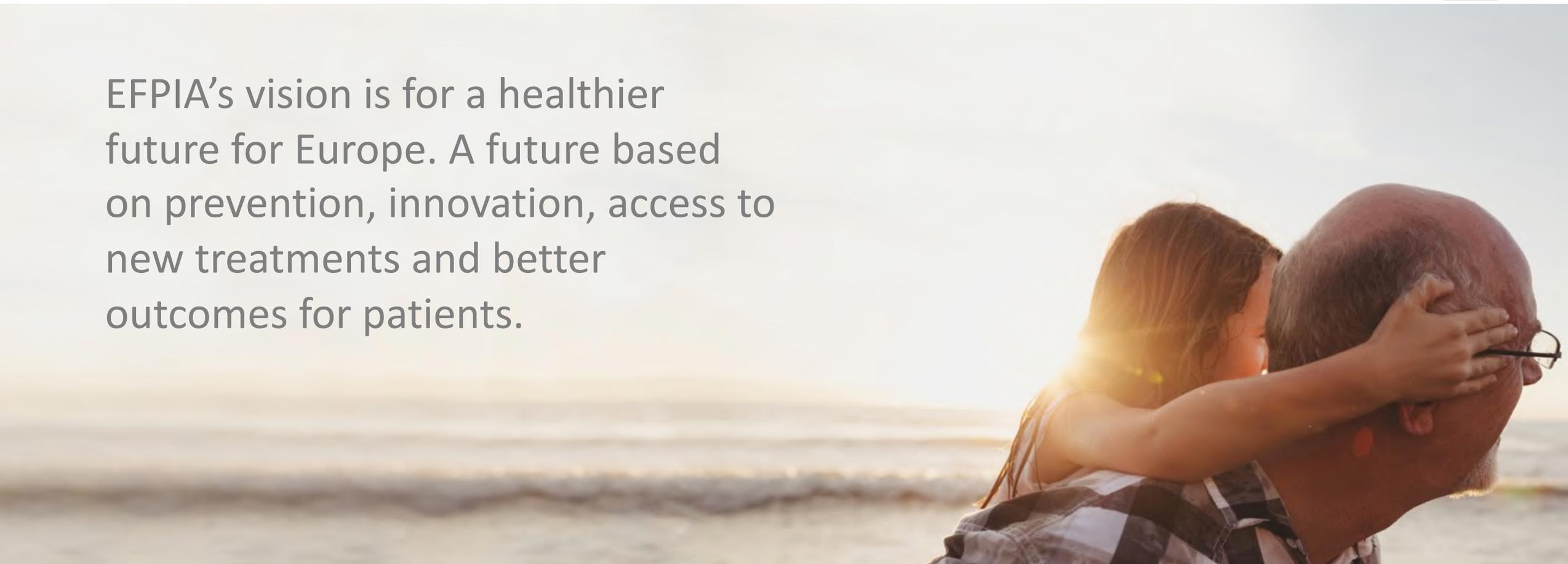
# About EFPIA



1  
specialised  
group

## Our vision

EFPIA's vision is for a healthier future for Europe. A future based on prevention, innovation, access to new treatments and better outcomes for patients.

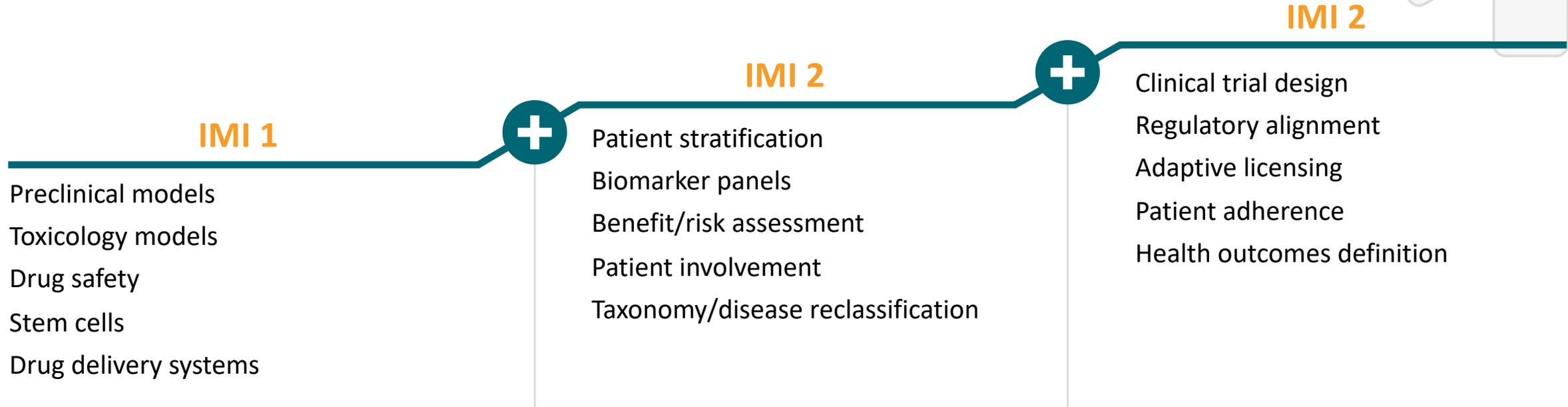


## Our mission

EFPIA's mission is to create an environment that enables our members to innovate, discover, develop and deliver new therapies and vaccines for people across Europe, as well as contribute to the European economy.



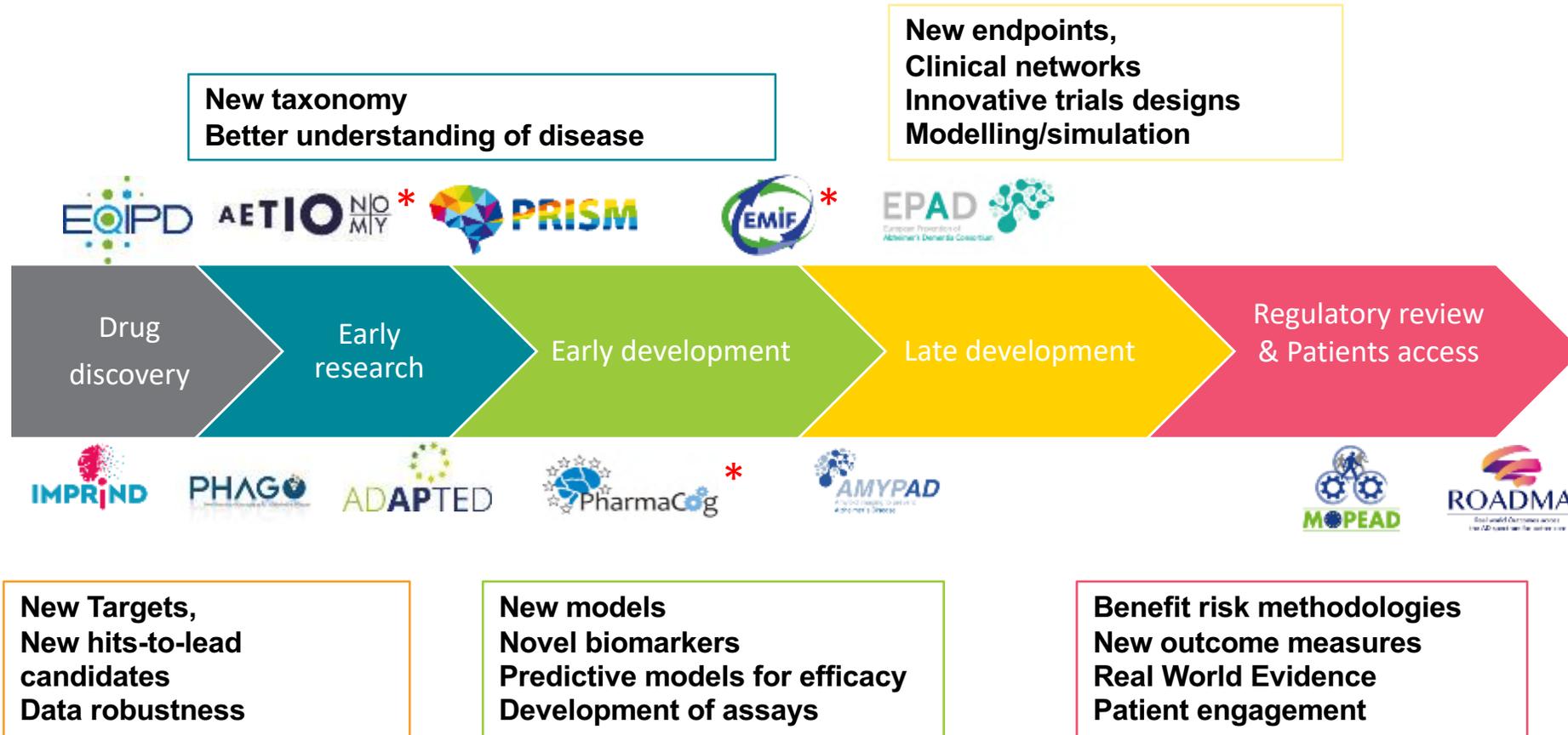
# IMI Accelerates Research and Development to Strengthen Competitiveness



## Pharmaceutical Value Chain

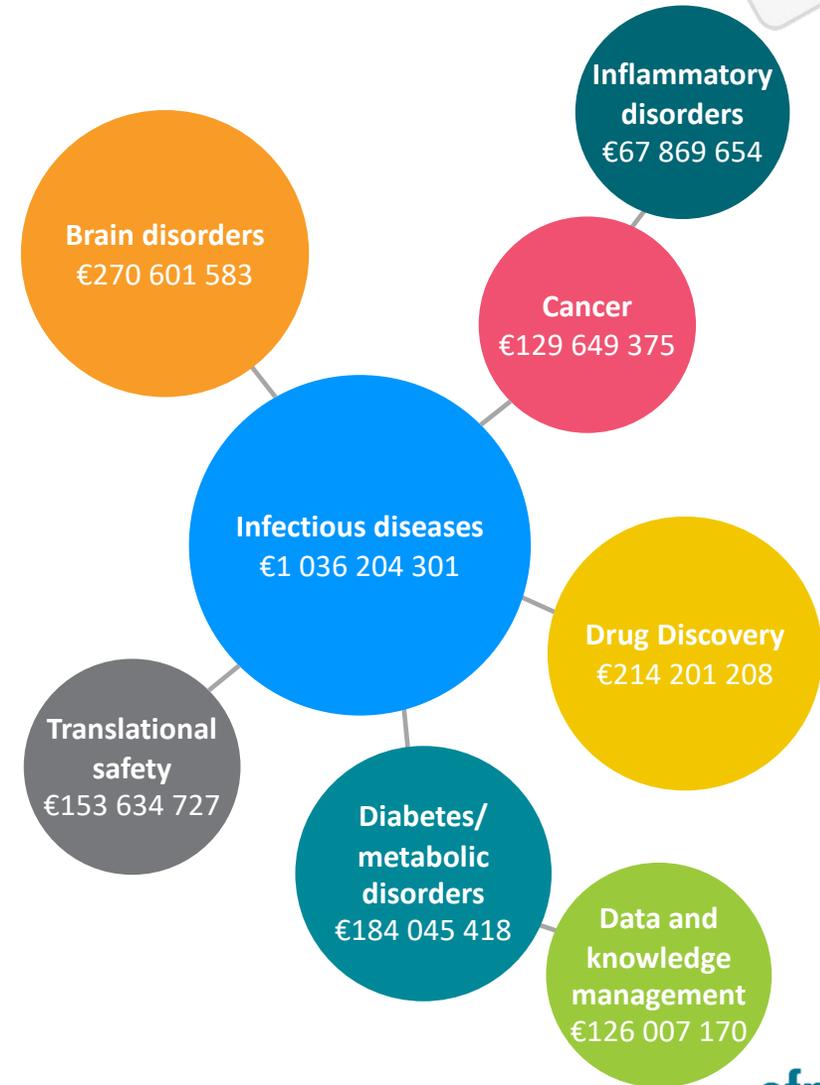


# Across the research and healthcare value chain | discovery to delivery & prevention to AD management



\* Finished

# Types of Organizations Participating in IMI and Major Funding Areas



## Examples from a decade of successes

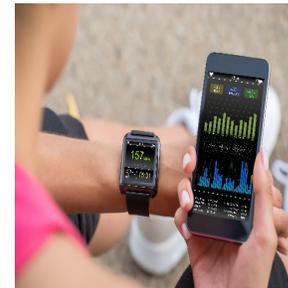
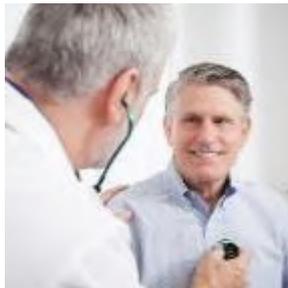
- \* Ebola vaccines and diagnostics,
- \* New candidate antibiotics,
- \* Tools to predict toxicity (several letter of support issued by regulators)
- \* Standards that opened the path to autism medicines research,
- \* 70 novel drug targets, 35 validated drug targets
- \* Several clinical trials networks (1800 sites across Europe) and 39 cohorts and registries to optimise clinical trials
- \* Developed manufacturing method of flucytosine that dramatically cuts production cost
- \* Outcomes (real world data) data infrastructure and governance
- \* First ever human beta cell line culture which changed the way diabetes research is done
- \* Etc.

See IMI website: **Projects & results** [www.imi.europa.eu/projects-results](http://www.imi.europa.eu/projects-results):

→ [Factsheets](#), [Success stories](#), [Catalogue of project tools](#)

# Health PPP under Horizon Europe

Cross-sector collaboration to boost health innovation and reinstall Europe's leading competitiveness for the benefit of society and all its members





## Important Disclaimer:

The purpose of this document is to present the status of discussions between 6 health industry associations. The content should not be considered as final or pre-emptive of final legislative decision about future public private partnerships under Horizon Europe.

# What if we could help kids and adults with resistant asthma (50% of affected patients) to live normal lives?

## The challenge

- 30 million people in Europe suffer from Asthma and are subject to a life time treatment.
- 60% do not or do poorly responds to standard steroid treatments.
- About 4% with severe asthma do not respond at all

## Purposefully and prospectively combining technologies, data, products and services to:

- Understand resistance
- Identify preventions treatment pathways
- Offer the most effective combinations of tools that helps effectively (self-) managing asthma by kids and adults

# Healthcare in Europe faces multiple challenges ...

**Growing disease burden**



**€37 billion costs of osteoporosis** in Europe, equivalent to 1 to 2.5% of total GDP

**€1.5 billion costs of resistant bacteria**, which **kills 33,000 EU patients** annually

**More sophisticated diagnostics & treatments**



**>80**

**genomic biomarkers** indicated in **approved** targeted therapies - personalisation and integration of healthcare requires increasingly cross-sector expertise

**Europe falling behind in competitiveness**



**3.5x**

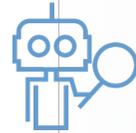
**fewer patents** generated by Europe than the US

**0.67x**

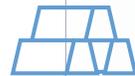
of **drug candidates** based on emerging modalities currently in Ph3 or registration in Europe vs the US

# ... while biology promise and technology innovation has yet to gain more traction

**New scientific & technological advancements have transformative potential...**



**...but multiple barriers for adoption**



- Digital therapies appearing
- Precision therapies emerging
- Big data as a critical enabler to transforming healthcare
- Siloed approaches
- Different sets of standards
- Limited translation of science into products and services
- Reimbursement focusing on disease management
- Locked value of data analytics
- Interdisciplinary barriers in medical science

## In response to this, we propose the cross-sector European health PPP

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The PPP is a **unique** initiative

- To mobilise and combine expertise across pharma, biologic, med tech and health IT, converging the differences among the sectors
- To champion integrated and personalised healthcare by driving cross-sector innovation

The PPP will help achieve the goal through

- **De Novo data generation** along the whole R&D value chain
  - **Integration of technologies and know-how** to create and deliver better and safer products and ancillary services
  - **Integration of products and services** to create innovative health care solutions
  - **Integration** of clinical, community, social and informal **care workflows**
  - **Integration or alignment of business models** for these innovations involving different sectors in the healthcare industry
-

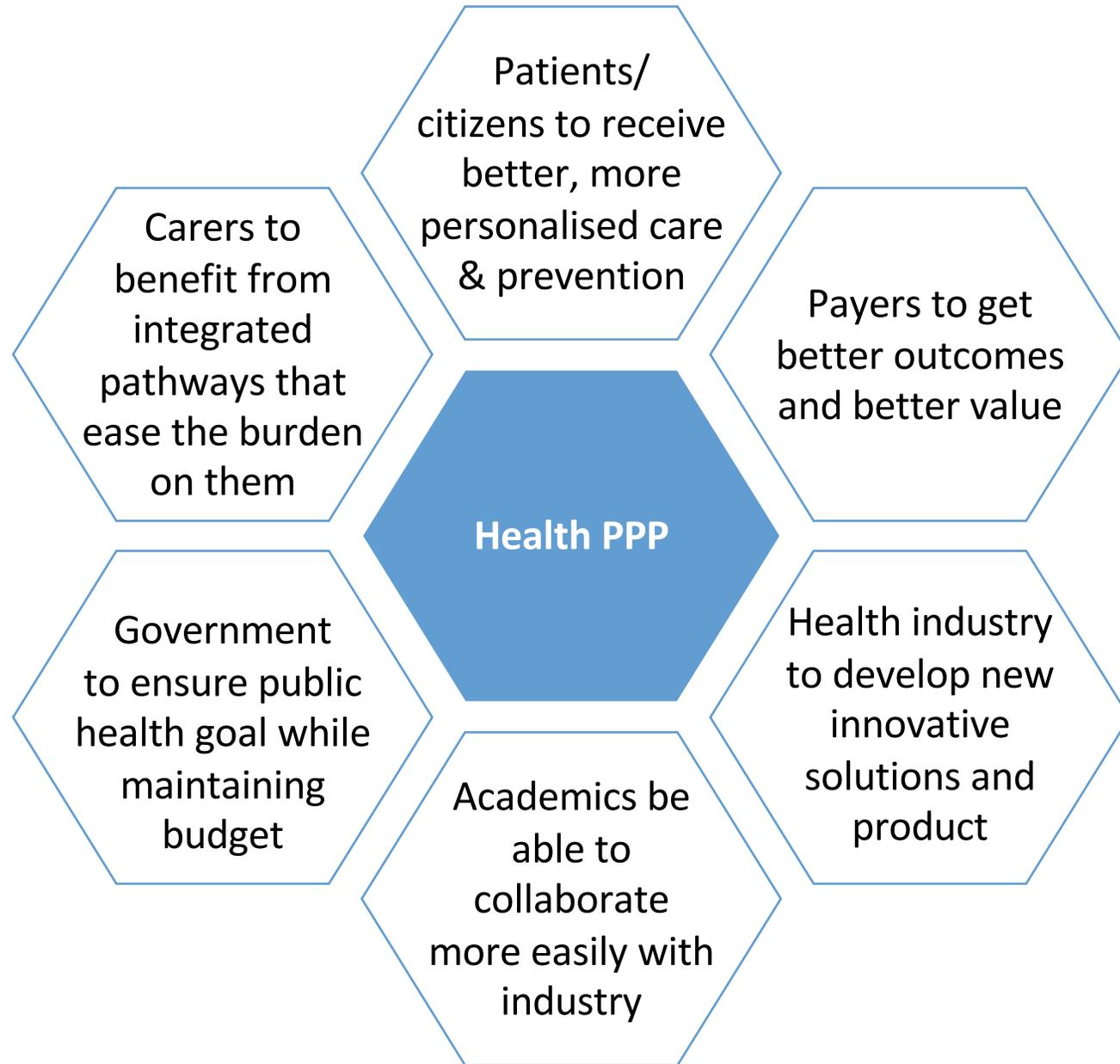
## Five concrete action areas of the cross-sector SRA

### Goal:

Fast delivery to patients of the most pertinent and safe innovative solutions to prevent, diagnose, treat and manage non-communicable and infectious diseases, while preserving the sustainability of the healthcare systems and competitiveness of health industry

- 1 Harness advances in and synergies between genetics, biology and technology innovations for more precise and effective prevention, diagnosis, treatment and care
- 2 Develop patient-centric, integrated care solutions along the entire healthcare continuum
- 3 Combine Big Data with advanced analytics/artificial intelligence to enable the new integrated healthcare approach
- 4 Empower citizens and patients to engage with, manage and improve their health
- 5 Enable and strengthen value-based decision making in health and social care systems

# The PPP will benefit all stakeholders



## ...and secures Europe's future competitiveness

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PPP offers a unique value proposition by driving multi-sector collaboration to accelerate the development of citizen-centred health care innovations

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Speed is essential for sustainable competitive advantage

- Benefits of speed include **faster innovation, lower development costs, larger market share, and greater forecasting accuracy**
- In pharma, first-to-market players have a **6%** market-share **advantage** over later entrants<sup>1</sup>
- In medical device, 6 months faster to market could save up to **7-17%** development costs<sup>2</sup>

Cross-sector collaboration enables the development acceleration

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<sup>1</sup> "Pharma's first-to-market advantage", McKinsey 2014

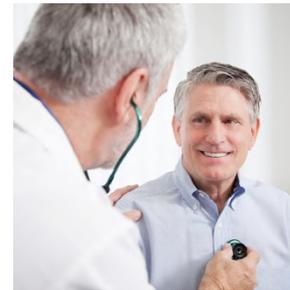
<sup>2</sup> Evaluate estimates that average time-to-market for a medical device falls between three to seven years



European Federation of Pharmaceutical  
Industries and Associations



# Thank you for your attention – any question?



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