MINISTERIAL (Bio-Pharmaceutical) INDUSTRY STRATEGY GROUP
10th June 2015, 2pm – 4pm
Board Room, Richmond House, Whitehall

Attendees

Government

George Freeman MP	Parliamentary Under Secretary of State for Life Sciences, DH and BIS

Industry

Pascal Soriot	CEO, AstraZeneca (Co-chair)
Steve Bates	CEO, BioIndustry Association (BIA)
Alison Clough	Acting CEO, ABPI
Gary Hendler	Senior Vice President & Global Corporate Officer Eisai Co Ltd
John Kearney	President of ABPI (General Manager UK & Ireland, Amgen)
Jean-Christophe Tellier	CEO, UCB
Patrick Vallance	President, Pharmaceuticals R&D, GSK
John Young	Group President Global Established Pharma Business, Pfizer Inc

Guests

Dr Tommy Dolan	Head of Drug Product Design and Supply & Sandwich Site Head, Pfizer

Officials

Rachel Cashman	Head of Clinical & Scientific Policy & Strategy Medical Directorate, NHSE
Will Cavendish	Director General for Innovation, Growth & Technology, Department of Health
Professor Dame Sally C Davies	Chief Medical Officer and Chief Scientific Officer, Department of Health
Andrew Dillon	Chief Executive, NICE
Dr Ian Hudson	Chief Executive, MHRA
Tim Kelsey	National Director for Patients & Information NHS England
Peter Knight	Deputy Director, Research Contracting, Information Intelligence and Stakeholder Engagement, Department of Health
Dr Nicole Mather	Director, Office for Life Sciences
Ruth McKernan	CEO, Innovate UK
Jonathan Mogford	Director of Policy, MHRA
Ed Moses	Deputy Director, OLS
Catherine Orme	Senior Policy Adviser, NHS Provider Policy, Life Sciences and Capital Public Services Group, HMT
Simon Stevens	NHS England
Dr Mark Treherne	Chief Executive, UKTI Life Sciences Organisation
Dr Keith Ridge	Chief Pharmaceutical Officer, NHS England, Department of Health & Health Education England
Linda Whalley	Health & Social Care Information Centre

Liz Woodeson	Director, Medicines, Pharmacy & Industry Group, Department of Health

Secretariat

David Kullman	Office for Life Sciences
Sue Middleton	Executive Director, British Pharma Group
James Anderson	British Pharma Group

Apologies

Professor Sir John Bell	Chair of OSCHR
Sir John Chisholm	Chair, Genomics England
Sir Malcolm Grant,	Chair, NHS England
Rt Hon Jeremy Hunt MP	Secretary of State, Department of Health
Rt Hon Sajid Javid MP	Secretary of State for Business, Innovation and Skills
Jo Johnson MP	Minister of State for Universities and Science, BIS
Professor Sir Bruce Keogh	National Medical Director, NHS England
Ian McCubbin	Senior Vice President NA, Japan and Global Pharma, GSK
Haruo Naito	CEO, Eisai Co Ltd
Lord O'Neill	Commercial Secretary, HM Treasury
Fleming Ornskov	CEO, Shire
Professor Sir Mike Rawlins	Chair, MHRA
Professor Sir John Savill	CEO, Medical Research Council
Nick Seddon	Prime Minister's Office, No. 10
Stephen Whitehead	Chief Executive, ABPI

Welcome and introduction

1. Pascal Soriot opened the meeting by welcoming those attending, particularly those attending for the first time including Simon Stevens and Jean-Christophe Tellier.

Introduction from Ministers

2. George Freeman expressed his pleasure at returning as the Minister for Life Sciences. There was a strong understanding across Government of the need to build a landscape that was economically competitive for the life sciences sector and a health system more open to innovation.

3. He reiterated his key priorities and his vision of collaborating with the sector to achieve a tangible breakthrough with accelerated access to innovative medicines and med tech devices. He stressed the importance of health care data, for which he now had responsibility in the Department of Health.

Minutes of last meeting and matters arising

4. The minutes of the meeting in November were agreed.

Uptake - Accelerated Access Review and Report of short-life working group

5. Nicole Mather gave an update on the review and next steps, as well as the latest progress on the short life working group's activity to accelerate patient access to non-NICE appraised, non-highly specialised and non-specialised commissioned medicines.

6. George Freeman emphasised that the review was open and independent and he was keen to hear industry's views. It was a major piece of work and he was looking for an initial report in the autumn with a second phase to consider roll out in the longer term.

7. The review was welcomed by industry. The following points were made in discussion:
    - *Process*:
        - It was critical for the review to be aligned with the wider landscape for health and care such as the NHS five year forward view.
        - There was concern that the broad scope of the review created a risk of lack of focus on key issues – it should identify those key areas where was potential to make a big difference.
        - As medicines were developed over a long time period of five to ten years, looking at medicines currently available on the market would help understand blockages in the system to produce recommendations in the shorter term.
        - Industry believed that the workstreams "articulating need", "priorities and principles for innovation" and "accelerated development pathways" have a more international scope driven by the global nature of regulatory systems and R&D programmes, whereas those on "affordable national funding models to drive innovation" and "supporting affordable uptake and adoption" were more England focused, which the Review can more directly impact. Pricing in UK also has an important global impact due to referencing by other countries.
        - Industry emphasised the need to ensure better translation of policy objectives into implementation across the NHS. The PPRS manages affordability of the drugs budget, but this hasn't led to the expected increase in uptake.
        - The review would need to take account of key system risks e.g., both for patients (in terms of safety) and NHS (in terms of paying for products with less certainty).
        - Industry offered to provide senior/global industry input to the formal advisory groups, before the draft report is published. This was welcomed.
    - *Metrics:*
        - There was a need to define KPIs that focused on elements with the greatest impact. Both industry and government needed to make proposals on metrics for measuring success and these should build on metrics already developed.
        - The Competitiveness Indicators provide a good starting point, especially for rate of uptake compared to other countries.
    - *Financial:*
        - Whilst there was a commitment to invest more in the NHS, the growth over this parliament would be flat in real terms and efficiency savings of £20-22bn would need to be found. Whilst there was concern at affordability issues in the NHS there was an aspiration to work together to enhance uptake of innovative medicines.

8. The work of the SLWG was commended and it was noted that it could deliver some quick-wins that could be presented to the next MISG.

9. Pascal Soriot concluded by summarising that:
    - The next meeting should review metrics, which added value for industry, which should provide examples of medicines that went well/not so well.

- The review should make quicker progress on the workstreams focusing on domestic issues.
- **Actions**:
    - *Industry and government to make proposals on metrics building on those already developed. These should be reviewed at the next MISG meeting.*
    - *Review team to propose appropriate way for senior/global industry executives including R&D engagement with formal review structures before publication of AAR interim findings in September.*

Investment Environment - Exports including MMIP update

10. Ed Moses introduced a paper outlining the Government's ambition to increase life science related exports as part of £1 trillion plan, to set out the areas with the greatest potential and to propose how industry and government can best work together on this agenda.

11. Tommy Dolan introduced a paper from the Medicines Manufacturing Industry Partnership (MMIP) describing progress on its core work-streams including adopting new manufacturing technologies and increasing manufacturing in the UK, thus contributing to exports.

12. The following points were made in discussion:
    - Proposals were broadly supported. There were also opportunities for smaller companies to export that should not be ignored.
    - There were opportunities to reduce carbon footprint through manufacturing – UK companies had done a lot of work on this and it is a selling point.
    - It was agreed that the location of HQ debate needs to be considered more broadly rather than just in manufacturing terms and thereby outside MMIP.
    - There was a need to develop a more holistic view of what health exports cover and produce tangible targets.
    - The Medicines Manufacturing Innovation Centre (MMIC) was highlighted as of particular interest as the next key project.

13. Pascal Soriot concluded by summarising that:
    - The issue of attracting HQs to the UK was a broader issue rather than part of the export agenda and should be kept separate
    - The export agenda was also linked to other factors such as ability to access the domestic market
    - NICE's decisions had influence internationally

Action:

- *OLS/UKTI and industry to develop a more holistic view of what health exports cover and produce tangible targets for broader exports — for next MISG meeting.*

Innovate UK – role and priorities

14. Ruth McKernan introduced a paper on Innovate UK's activities and outlined their forward strategy to support the growth of the Health/Life science sector in the UK.

15. There were five key questions on which she welcomed industry's views:
    - Clusters – where were the places to build on areas of expertise?
    - Funding small businesses through the Biomedical catalyst – do industry know of assets to develop?
    - In which areas could Innovate UK increase their economic impact by supporting the growth of mid-sized companies?

- What funding models other than grants are worth exploring to build businesses?
- What were the opportunities for additional catapults in the life sciences sector – building on the success of Cell therapy catapult?

16. Pascal Soriot requested that industry let Innovate UK have their views on the questions posed by Ruth on Innovate UK's strategy for future investment.
Action:
    - *Innovate UK to work with Industry to respond to the questions set out by Ruth.*

Data

MISG data working group update

17. Nicole Mather outlined progress on the work commissioned at the last MISG meeting to provide proposals for how the UK's health data environment could be improved to support research. In summary, a workshop was held with 40+ key stakeholders to identify and develop pilots for data sharing; priority data sets have been defined; and a programme of work to deliver by the end of 2015 has been agreed.

18. The following points were made in discussion:
    - This was a priority - good progress had been made and MISG looked forward to moving to the next stage.
    - CMO thanked Patrick Vallance, Mene Pangalos, Peter Knight and John Bell for their leadership.
    - MISG members were encouraged to champion the programme within their organisations.

A.O.B.

19. Pascal Soriot thanked Sue Middleton for her work as industry secretariat for ten years.

Papers to note for information

20. There were two papers to note for information:
    - One year on progress report paper on the Science Industry Partnership (SIP)
    - Metrics update