

# PharmAus20 Digital Forum Summary Report

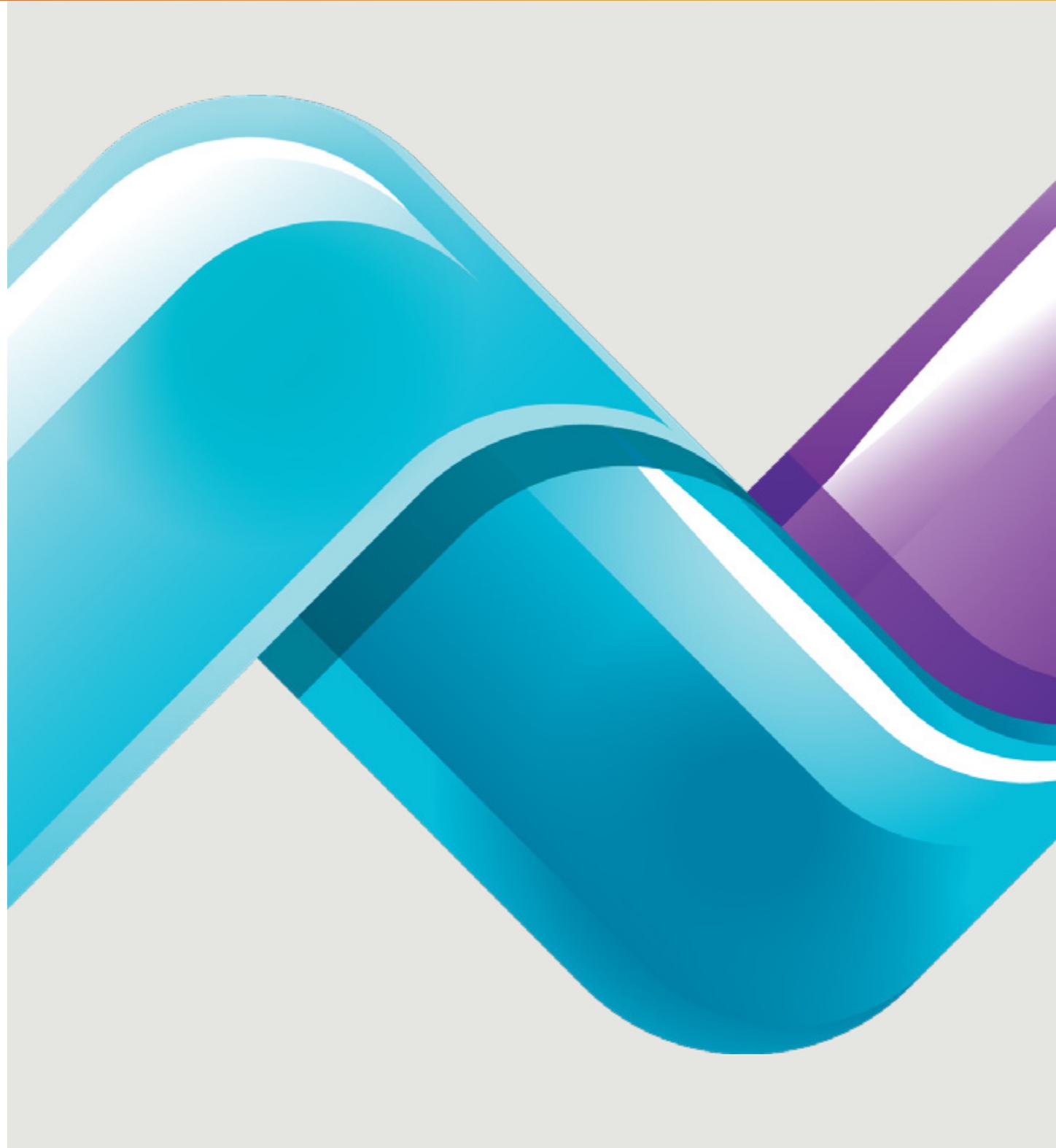
Medicines Australia

## About PharmAus20

PharmAus20 is Medicines Australia's fourth annual Policy Symposium. Every year the Symposium provides a platform for an open discussion between industry experts and policymakers, with the goal of improving the future of healthcare in Australia. Usually held over one action packed day in Canberra, this year's Symposium was held virtually over four sessions. The discussions focused on the lessons from COVID-19 and what they will mean for the future of innovation in the health and pharmaceuticals sector.

PharmAus20 explored the impacts of COVID-19 on industry, patients, communities, and governments. The key presentations explored the COVID-19 lessons from international leaders on industry and government collaboration; how we can improve Australia's whole of ecosystem approach to Research and Development; what COVID means for the long term trajectory of digital within the industry; and how the industry can help Australia recover from the economic impacts of the pandemic. The Symposium flagged what COVID-19 induced changes have meant for patients, and how the industry can ensure Australia is better prepared for the next crisis and the next stage of recovery.

Over the course of the four weeks, 23 speakers, including the Federal Minister for Health, the Shadow Minister for Health and various stakeholders from the health sector offered their perspectives on what COVID-19 has meant for the medicines industry. The key ideas and themes that emerged from speakers and discussions at PharmAus20 are summarised in the pages below.



## Key themes

1

The industry has responded well to COVID-19, but the journey is not over

2

It takes the whole ecosystem to bring innovative treatments to patients

3

Consumers are demanding the industry integrates digital offerings

4

Industry reform plays a key role in ensuring Australia's economy fares better than others





## Overview

Medicines Australia hosted PharmAus20 over four interactive digital forums, starting on the 27th of August 2020 and concluding on the 17th of September 2020. Over 200 participants joined each session, including leaders from industry, government, academia and the community. The event included presentations from the Hon Greg Hunt MP, Minister for Health, and the Hon Chris Bowen MP, Shadow Minister for Health as well as CEOs, chairs, and industry leaders. This year, the focus of PharmAus20 was on COVID-19 and its implications for the industry, government, and patients. The segmented nature of the event meant that each discussion was informed by the latest COVID-19 developments and learnings.

The Hon Greg Hunt MP opened his address by sharing his appreciation for the work the health and pharmaceutical industry have done in responding to the pandemic. He also spoke about the recent reforms in the sector, and about the government's plan on continuing the innovation initiated in response to the pandemic. Similarly, the Hon Chris Bowen MP was thankful for the work the industry had done so far and emphasised that the industry had a key role left to play in fighting the virus, saying that only medicine will destroy the curve.

Each session at the PharmAus20 Symposium explored a different facet of the COVID-19 impacts on the industry:

- **Session one:** COVID-19 lessons from international industry leaders - critical issues management, and key outcomes from an international perspective.
- **Session two:** The challenges and opportunities of a whole of ecosystem approach to Research and Development.
- **Session three:** Sharpening the focus on patient-centric healthcare delivery and collaboration through data, telehealth and artificial intelligence.
- **Session four:** The impact of COVID-19 on Government finances and why a healthy Australia means a healthy

economy. Will the Health Technology Assessment and vaccines listing process need to change?

Each session featured an introduction from the chair, followed by presentations from each speaker and a panel discussion with questions from the audience. Each speaker brought a unique perspective along with viewpoints from across industry and government. The discussions focused on what we have learnt from COVID-19 and what that means for the industry's future. Four key themes emerged from the discussions throughout the sessions:

1. The industry has responded well to COVID-19, but the journey is not over. Industry and regulators must now ensure that the unprecedented levels of collaboration and communication – that have been broadly supported – are maintained in the system going forward.
2. It takes the whole ecosystem to bring innovative treatments to patients. Any issue or gap across the capabilities of Australia's researchers, pharmaceutical companies, manufacturers, or regulators can halt the progress of getting new treatments to patients.
3. Consumers are demanding the industry integrates digital offerings. The digital trends that have existed in health have been expedited because of COVID-19. The pharmaceutical and health industry must now look to reinforce this development, and ensure consumers are being offered the best service possible.
4. Industry reform plays a key role in ensuring Australia's economy fares better than others. Australia is well placed to reap the economic benefits that come with successfully containing COVID-19. Government and industry must now work closely together to ensure these benefits are realized and sustained well into the future.

This report summarises the outcomes of the Symposium and details the themes in the sections below.

# Sessions and speakers

## Session

Welcome and opening address

## Speaker

Dr Anna Lavelle, Chair, Medicines Australia

Elizabeth de Somer, CEO, Medicines Australia

### Session 1

COVID-19 lessons from international industry leaders - critical issues management, and key outcomes from an international perspective

The Hon Chris Bowen, MP, Shadow Minister for Health

Thomas Cueni, Director General, International Federation of Pharmaceutical Manufacturers & Associations (IFPMA)

Nathalie Moll, Director General, European Federation of Pharmaceutical Industries and Associations (EFPIA)

Dr Richard Torbett, CEO, The Association of the British Pharmaceutical Industry (ABPI)

Dr Graeme Jarvis, CEO, Medicines New Zealand

Dr Anna Lavelle, Chair, Medicines Australia – Session Chair

### Session 2

The challenges and opportunities of a whole of ecosystem approach to Research and Development

Dr Rob Grenfell, Health and Biosecurity Director, CSIRO

Prof John Zalcborg, Chair, Australian Clinical Trials Alliance

A/Prof Dominic Wall, Chief Science Officer, Peter MacCallum Cancer Centre

Dr Paul Griffin, Medical Director, Nucleus Network

Lorraine Chiroiu, CEO, AusBiotech – Session Chair

### Session 3

Sharpening the focus on patient-centric healthcare delivery and collaboration through data, telehealth and artificial intelligence

Anthony Egeland, Digital Health Advisor, Consumers Health Forum of Australia

Dr Ganesh Naidoo, CEO, Medmate

Dr Silvia Pfeiffer, CEO and Co-Founder, Coviui

Chris Dobney, patient representative

Stuart Knight, General Manager, Roche Products Australia – Session Chair

### Session 4

The impact of COVID-19 on Government finances and why a healthy Australia means a healthy economy. Will the Health Technology Assessment and vaccines listing process need to change?

The Hon Greg Hunt, MP, Minister for Health

Saul Eslake, Economist, Vice Chancellor's Fellow at the University of Tasmania & former Chief Economist at ANZ

Paul Cross, Founder, BioPharmaDispatch

Prof. Terry Nolan AO, Head of Vaccine and Immunisation group, Doherty Institute

Caroline Edwards, Associate Secretary, Department of Health

Liz Chatwin, Country President, AstraZeneca – Session Chair

# 1

## The industry has responded well to COVID-19, but the journey is not over

The industry has responded well to COVID-19, but the journey is not over. Industry and regulators must now ensure that the unprecedented levels of collaboration and communication – that have been broadly supported – are maintained in the system going forward.

A key theme of PharmAus20 was the incredible response to COVID-19 by industry, communities, and the government. Many speakers were impressed by the level of collaboration, commitment, and communication they had seen, noting that this was an unprecedented response to a pandemic. It is now time to embed these strengths into the foundations of the industry.

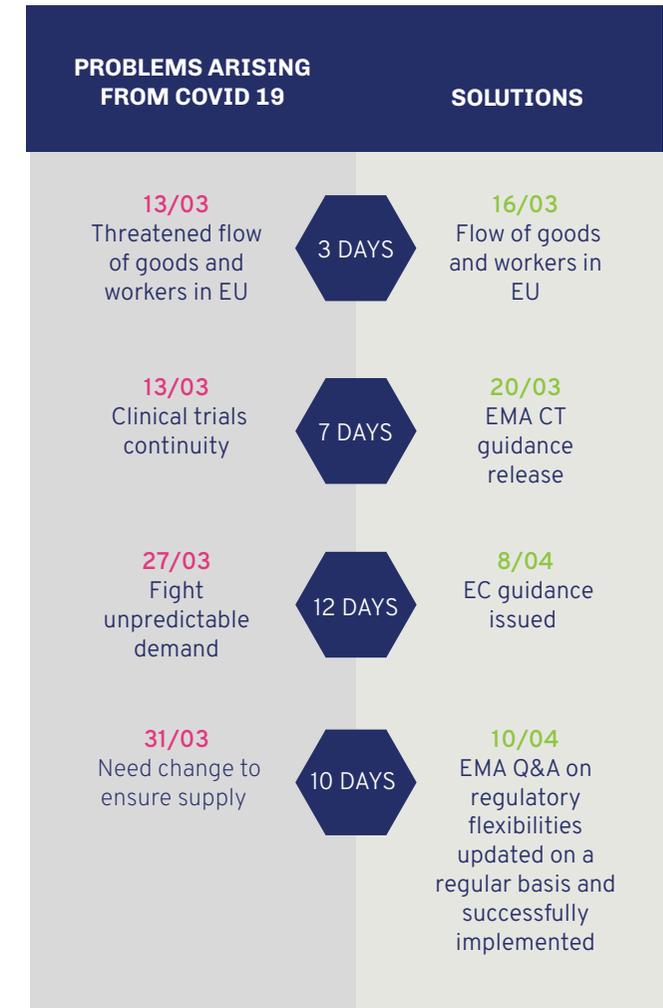
### The pharmaceutical industry has embraced 'all for one, one for all'

Thomas Cueni, Director General of IFPMA, opened by describing the damage of COVID-19: lives lost across the world, supply chains distributed, and billions of dollars in costs. In the face of these problems, Thomas Cueni was proud to see the industry's bold response. There have never been such wide-spread commitments internationally, with companies promising responsible pricing of treatments and enough vaccine availability for all countries, regardless of GDP. The camaraderie and collaboration shown by the industry has been the primary driver of the rapid progress in diagnostic, treatment, and vaccine development.

### Collaboration and communication must continue past COVID-19

Nathalie Moll, Director General of the EFPIA, emphasised that it was collaboration and communication that was most important when dealing with a pandemic like COVID-19. This was especially true during the early days of the pandemic when countries enacted policies that reduced the availability of ingredients for medications and blocked staff from crossing borders. It was coordination between industry and government that allowed for the rapid solutions that fixed these problems, as highlighted in Figure 1.

Figure 1: Speed of responses to problems caused by COVID-19



# 1

## The industry has responded well to COVID-19, but the journey is not over

“Over 30 years, I have never felt so proud of representing the industry. Within a few weeks of the pandemic the industry understood this was a unique challenge to the world.”

Thomas Cueni, Director General, International Federation of Pharmaceutical Manufacturers & Associations (IFPMA)

Dr Graeme Jarvis, CEO of Medicines New Zealand, discussed the key methods New Zealand employed to drive effective communication across industry and government. A key step is to communicate the value proposition through every channel at your disposal, while being honest and patient. To figure out priority areas, you must first determine pressure points for businesses and stakeholders. Industries and governments across the world should embrace these tips and use them to communicate clear expectations to individuals who are worried about the vaccine trial process being rushed.

The widespread collaboration over the licensing of a COVID-19 vaccine is only the first step according to Dr Richard Torbett, CEO of the ABPI. He emphasised that the manufacturing and distribution of a vaccine will require even greater collaboration between industry and government – especially if the industry is to meet its commitments.

### **Some patients have been left behind in the rush to fight COVID-19**

The Hon Chris Bowen MP described the byproducts of the total focus on reducing COVID-19 case numbers, including: an increase in mental health issues, falling immunization rates, and a decreased level of early diagnosis for other serious diseases. These unforeseen byproducts may have long term health implications that were not properly understood by industry or governments. Accordingly, Dr Richard Torbett challenged the audience to start thinking about how we prepare for the next healthcare shock so that we can react without neglecting other patient issues. Diagnostic services, vaccinations, and clinical trials for other illnesses cannot be put on hold for each pandemic without accepting the long-term health effects.

# 2

## It takes the whole ecosystem to bring innovative treatments to patients

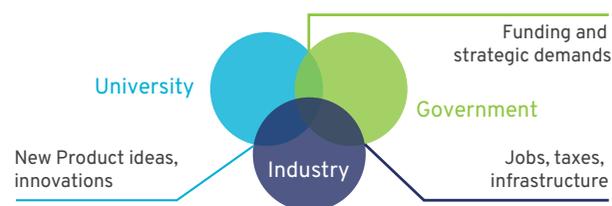
It takes the whole ecosystem to bring innovative treatments to patients. Any issue or gap across the capabilities of Australia's researchers, pharmaceutical companies, manufacturers, or regulators can halt the progress of getting new treatments to patients.

**“Without the ecosystem supporting cell therapy we would have no access to participate in these studies, and patients would be denied opportunities”**

A/Prof Dominic Wall, Chief Science Officer, Peter MacCallum

Harmony is achieved when everything works together: government leads the strategic direction by funding research at universities and providing incentives to industry; while universities and industry work together to research and capitalise on new ideas (Figure 2). COVID-19 has revealed that the ecosystem has shortfalls that need to be addressed.

**Figure 2: Interaction of the pharmaceutical ecosystem**



### COVID-19 has forced countries to re-evaluate their medical supply chains

COVID-19 has made all countries of the world look at improving their health industry's resilience. Dr Rob Grenfell, Health and Biosecurity Director at CSIRO, discussed the gaps in Australia's therapeutic and vaccine supply chain: Australia had strong research capabilities and know-how, but had weaknesses in manufacturing and parts of the clinical trial process. COVID-19 has presented Australia with an opportunity to rectify these shortcomings and ensure our system is prepared for the next health shock. Australia is not alone in looking at this. Conglomerates like the European Union are now seeking to embed greater unity across their health systems and procurement plans, including having an open regulatory alignment that is flexible enough to allow for rapid responses.

### COVID-19 has created unique challenges for the clinical trials industry

A/Prof Paul Griffin, Medical Director at Nucleus Network, discussed the various challenges that Nucleus Network (currently running three COVID-19 vaccine trials) has responded to. This first is that keeping clinical trial subjects

and staff safe has never been more difficult, and this has required a large investment in strict infections controls on site and prioritisation of COVID-19 related trials. The second, related, problem is that fear of contracting COVID-19 has made patients less willing to sign up for clinical trials. The solution was communication campaigns that specifically address participants fears of contracting COVID-19. The third issue was the incredible pace of the COVID-19 vaccine trials that has now caused some people to doubt the robustness of trial safety protocols, making people wonder if a vaccine is going to be safe. Overcoming this will require broad investment from industry and government in education campaigns to assure the public that comprehensive safety checks have been done.

### It's time to integrate clinical trials with a broader range of patients and health services and invest in local expertise

Prof John Zalcborg, Chair of Australian Clinical Trials Alliance, talked about the need for clinical trials to expand their patient bases and embrace diversity. It's no longer acceptable for the millions of Australians who live rurally to have limited or no access to clinical trials, or to exclude those who don't speak English as a first language. The industry must embrace diversity, which will improve access for participants and the quality of trials.

A/Prof Dominic Wall, Chief Science Officer at the Peter MacCallum Cancer Centre, stressed that innovative techniques, such as cell therapy, require local expertise and capabilities so that patients can quickly access treatments. This means reducing Australia and Asia's reliance on American manufacturing, resulting in shorter wait times for patients. He also discussed the possibility of a national referral management process to eliminate any differences in access to care for patients of different states. He concluded by emphasizing how the approaches developed in responses to COVID provide the opportunity for the ecosystem to be expanded to allow more patients access to groundbreaking treatments.

# 3

## Consumers are demanding the industry integrates digital offerings

Consumers are demanding the industry integrates digital offerings. The digital trends that have existed in health have been expedited because of COVID-19. The pharmaceutical and health industry must now look to reinforce this development, and ensure consumers are being offered the best service possible.

**“In every other part of life patients could access services digitally. Food on the phone, uber on the phone, but interacting with a medical professional was fragmented and inconvenient”**

Dr Ganesh Naidoo, CEO, Medmate

The third session of the Symposium discussed what digital health meant for the industry going forward. There is no doubt that COVID-19 has put this movement into hyperdrive: Medicare now rebates telehealth appointments; telehealth appointments have become commonplace; and improved care is being offered to rural patients who previously struggled to access services. Digital technologies are now firmly embedded in health services and consumers will expect this integration to continue. Speakers considered how the industry has embraced these COVID-19 induced changes, and how they may continue to provide better patient experiences. It is timely for the industry to consider what other reforms should take place that put customers more firmly in control of their own health.

### Consumers want to be empowered to make their own choices

Anthony Egeland, Digital Health Advisor for CHF, suggests that now more than ever consumers are demanding to be put in control of their own healthcare. They like telehealth, e-Prescriptions, and online pathology. They want information security, human-centered design, and reliable access. They expect a cultural shift – digital as a right and not a luxury. COVID has contributed to an explosion on these fronts, with more convenient, safer and cheaper options now being offered to consumers.

Chris Dobney described how these changes are benefiting patients across Australia. Based in regional Australia Chris was able to participate in a Melbourne-based clinical trial because of changes precipitated by COVID-19: digital consultations with specialists from across Australia; self-administered drug trials; and health systems working together to coordinate check-ins.

### The industry must work together to remove the disconnect in services

Despite the recent progress there is still much work to do to fully integrate the benefits of these technologies across the health system. Chris Dobney saw the benefits of the digital transformation with COVID-19, but he also saw continuing barriers due to the disconnected nature of the health system. While getting medical imaging scans done in his local area was easy enough, he found that getting the scans sent to Melbourne was an unnecessarily difficult ordeal. Dr Ganesh Naidoo, CEO and founder of Medmate, emphasised the gaps that still exist for patients trying to access treatments. One is the archaic process between getting a script from a doctor and getting that medication to your home. This process is largely still physical, with no real benefit to the consumer. So, while companies like CoviU have sorted out telehealth appointments, there is still a great way to go to ensure the whole patient experience is connected, safe, and convenient. Anthony Egeland suggests we look to other countries, fund ongoing research, and collaborate across industry and government to develop a multi-stakeholder approach to the next iteration of Australia's digital health strategy.

### Digital health shouldn't replace human interactions, but should aim to complement and enhance them

Dr Silvia Pfeiffer, CEO and Co-Founder of CoviU, believes telehealth appointments are here to stay, especially for simpler forms of consultations. The more complex forms of consultation that require devices and physical assessment may always need to be done face-to-face, but there is a chance for the biotech industry to complement these types of visits. For example, algorithms can now do the job that physical instruments once did, and it may only be a matter of time before accessible technologies, like smart phones, are able to detect, for example, lung infections from auditory patterns.

# 4

## Industry reform plays a key role in ensuring Australia's economy fares better than others

Industry reform plays a key role in ensuring Australia's economy fares better than others. Australia is well placed to reap the economic benefits that come with successfully containing COVID-19. Government and industry must now work closely together to ensure these benefits are realised and sustained well into the future

**“The aim of increasing jobs and spending cannot happen unless we can track, trace, treat, and contain the infection... the health response is there to give confidence.”**

Caroline Edwards, Associate Secretary,  
Department of Health

Australia is facing its first recession in decades and with this crisis comes a time for reflection and reform. Both industry and government speakers agreed: Australia's systems are some of the best in the world, but they do require improvements. The Hon Greg Hunt MP emphasised the key role pharmaceuticals are going to play in the economic recovery: because of our success in containing the coronavirus, Australia will be viewed as a COVID-19 safe nation, where companies will look to bring research, manufacturing, distribution, and clinical trials. Government and industry must now work together to ensure actions are taken to make this a reality.

### **Governments must take unprecedented measures to support Australia's households and industries through unprecedented times**

Economist Saul Eslake spoke of the long economic recovery that Australia will face. He noted that despite the great efforts to contain COVID-19, Australia will still face its greatest economic contraction since the 1930s. In his opinion, this justifies the record-breaking spending and debt raising done by the government in response to COVID-19. He argues that governments must spend now and save later to ensure that the foundations for future growth are invested in now.

### **Our approach to community engagement must be rethought**

Speakers suggested that the PBS and PBAC - which have traditionally been global leaders - are starting to lag international best practice. Many speakers at the Symposium believe that now is the time to invest in the future success of these processes. Terry Nolan of the Doherty Institute argued that vaccines are undervalued by the current system. For example, he argued we only invest public money in a vaccine when there is significant mortality/morbidity, without considering the ethics of not using vaccines until deaths and disabilities occur. The current econometric frameworks were designed for drugs and not vaccines,

meaning that preventative interventions, like vaccines, with long term benefits are not appropriately weighted or valued in current decision-making processes. There is also no direct community input on how much individuals are willing to pay for vaccines, leaving the ultimate beneficiary, the community, out of the decision-making process.

Paul Cross, Founder of BioPharmaDispatch, brought a more radical perspective on the PBS, saying that he believes it is time to move on from the debates around the cost efficiency of the PBS that have been ongoing for decades and take a step back and review the entire system. He agreed with Terry Nolan that the consumers and community input has become ineffective. On the other hand, Caroline Edwards emphasised that while there were definitely improvements to make now, that the system has served us well.

## About Medicines Australia

Medicines Australia represents the discovery-driven pharmaceutical industry in Australia. Their member companies invent, manufacture and supply innovative medicines and vaccines to the Australian community. Those medicines keep Australians out of hospitals, prevent disease and play a pivotal role in ensuring a productive and healthy community.

Medicines Australia represents the innovative medicines industry by:

- engaging with government and government departments, the Australian Medicines Industry, consumer groups and health professionals to develop health and industry policy
- building and maintaining relationships with government for fair reimbursement of medicines (through the Pharmaceuticals Benefits Scheme) to ensure the continuation of a viable medicines industry
- administering the Medicines Australia Code of Conduct which sets the standard for the ethical marketing and promotion of prescription medicines
- working with other health professional and consumer organisations on issues of mutual concern
- providing specialist advice to member companies
- educating the community about industry activities.

