



Medicines
Australia

Better health
through research
and innovation

MEDICINES OF TOMORROW



Australia's First Horizon Scanning Forum



Acknowledgement of country

We acknowledge the traditional custodians of the lands on which we research and work, and we pay our respects to the Elders past, present and future. We recognise and respect their cultural heritage, beliefs and continuous relationship with the land.

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Executive Summary

In recent years there have been increasing calls for nationally coordinated horizon scanning to better prepare Australia for the arrival of new and innovative health technologies, thereby facilitating faster patient access.

Sharing this ambition, on 6 December 2022, over 500 people registered to join Medicines Australia for the inaugural Horizon Scanning Forum, *Medicines of Tomorrow*, at the National Science Academy in Canberra and online.

The landmark event brought together stakeholders from across the Commonwealth Government, State and Territory Governments, the medicines industry, life sciences companies, researchers, clinicians, and patient organisations.

A future-focused agenda explored how horizon scanning could enable the sector to forecast Australia's future health needs better and facilitate faster access to new and emerging medicines for Australian patients.

The Minister for Health and Aged Care, the Hon. Mark Butler MP, addressed attendees and requested “a full report from the event and to progress horizon scanning in Australia to ensure that our health systems are fit for purpose to bring innovative technologies to patients quickly”.

This report aims to summarise the day's key themes and articulate the recommended next steps.

Key themes

Across the *Medicines of Tomorrow* forum, three key themes emerged from speakers and the panel discussion:



The COVID-19 pandemic has highlighted the necessity of disruptive innovation in order to effectively prepare for similar crises in the future. There is a strong and urgent need for nationally coordinated horizon scanning in Australia to ensure patients can access innovative, transformative treatments as quickly and safely as possible.



Medicines of Tomorrow was a powerful conversation starter. The time is now to harness the opportunity by working collaboratively to define the purpose of horizon scanning and create a practical framework to ensure immediate and ongoing success.



Scanning the horizon to collect data is not enough. For horizon scanning to be meaningful and effective, there needs to be a commitment to act on the data to prepare our healthcare systems.

Each of these themes is explored in further detail in this report.

Recommendations

Two recommendations emerged from *Medicines of Tomorrow* requiring immediate action to leverage the momentum of the event and the shared commitment of attendees:



Recommendation 1: Define the purpose and aims of horizon scanning

Conduct a roundtable discussion with key stakeholders to agree on the purpose, aims and framework for Australian horizon scanning.



Recommendation 2: Develop a Horizon Scanning Roadmap

Develop a Horizon Scanning Roadmap for Australia, detailing the steps all stakeholders must take to implement nationally coordinated horizon scanning.

These recommendations align with the Commonwealth and Medicines Australia's shared ambition to promote greater understanding and insight into new medicines, vaccines and new and emerging technologies coming through the development pipeline, in order to facilitate faster access for Australian patients.

Next steps

Horizon scanning for emerging health technologies will inform strategic planning and enhance patient access and health outcomes. *Medicines of Tomorrow* revealed clear support and a desire for collaboration across sectors. It is critical that we make swift progress on defining the purpose and aims of horizon scanning, and develop a clear framework and roadmap.

Medicines Australia would like to acknowledge the assistance of the Commonwealth Government in curating the invite list and reviewing the agenda for *Medicines of Tomorrow*. We look forward to working with the Commonwealth and key stakeholders to progress this crucial conversation and facilitate the timely genesis of a nationally coordinated horizon scanning approach.



Themes in more detail



Theme 1: The undeniable need for horizon scanning now

The pace of change in healthcare is astonishing. With many exciting advances on the horizon, there was a consensus at *Medicines of Tomorrow* that Australia has a clear need for a horizon scanning framework.

The forum's showcase highlighted some of the latest medical innovations. Featuring researchers, clinicians and patient advocates, these presentations emphasised what modern health innovation has to offer and the enormous implications for Australian patients if we are prepared to embrace the future.

From precision medicine for mental health and improvements in screening for dementia, to greater treatment efficacy through combination medicines and prolonging and improving quality of life with gene therapy, there is much hope on the horizon.

Health is evolving at a rapid pace

Innovation in health technology is already challenging Australia's health system, demonstrated by recent experiences with bringing some cell and gene therapies to Australian patients. The pace of this innovation is gaining speed and traction. An effective and efficient approach to investigating emerging health technologies ahead of time will allow Australia to find ways to accelerate patient access through better integrating these innovations into our health system.

It is critical that our systems, processes, and resources keep pace, noting that bold and brave reforms will be necessary to enable patient access. The Medical Futurist, Dr Bertalan Mesko, spoke about a future where integrated technology makes patients active participants in their healthcare by creating a seamless partnership with clinicians.



“What do we have to do today to get to the desired vision?”

– Dr Bertalan Mesko, The Medical Futurist

Forecasting is a must-have skill

Dr Mesko highlighted that clinicians and policymakers need to “understand [forecasting] as much as researchers”. He stressed that “you do not need to be a futurist to forecast; it is a critical skill to be developed within the health system”. Elizabeth de Somer, Medicines Australia CEO, echoed this viewpoint, noting the need to not only examine trends in healthcare and development but also emerging threats.

The importance of preparing for the future

In analysing how the rest of the world prepares for health and medical innovations, healthcare consultant Dr Franz Pichler highlighted the importance of getting the focus right.



“The purpose of horizon scanning determines the time horizon and where the activity should focus.”

– Dr Franz Pichler, Confluence Health Consulting

A common theme among presenters, including Dr Nick Simpson from the Department of Health and Aged Care (the Department), and Lung Foundation CEO, Mark Brooke, was that for horizon scanning to have a meaningful impact, the focus must be on the needs of the end user – the patient.

The value of short-term versus long-term horizon scanning and finding the right balance is also imperative. The example commonly emphasised was how we moved quickly during the COVID-19 pandemic to understand and approve critical vaccines, demonstrating how we can speed up decision-making if decisions balance product risk against the risk of mass fatalities.

Preparing for the next paradigm shift

Dr Mesko implored Australia to prepare for the next paradigm shift, whether it be a change in the equilibrium between patients and clinicians or welcoming Artificial Intelligence (AI) and automation.

These shifts will be exciting and transformational if we know how to embrace them through forecasting and preparation. The overwhelming commitment at Medicines of Tomorrow was to do this now for Australian patients by clearly defining the purpose of our venture in creating nationally coordinated horizon scanning.



Patients should no longer have to wait

Multiple presenters highlighted how the COVID-19 pandemic enabled clinicians, industry and governments to rapidly adopt new health technologies, highlighting that our system can adapt when faced with a challenge. However, much can be done upfront to plan and prepare systems for new innovations and challenges. That is the purpose of a horizon scanning framework.

The PRIMCAT case study presented at *Medicines of Tomorrow* demonstrated how imperative it is to predict, anticipate, and plan for new medicines. If we cannot predict emerging treatments, we cannot plan for them.



“...the most important [thing] with horizon scanning is how we end up using the results”

– Dr Jennifer Soon, PRIMCAT – University of Melbourne

Complex and emerging therapies cannot be implemented immediately. In the case of treatments like chimeric antigen receptor (CAR) T-cell therapy, years of budgetary, clinical, and operational preparation are required. This makes horizon scanning an essential tool across the health sector.

The stethoscope as a case study

Clinicians are traditionally slow to adopt new innovations. The stethoscope was highlighted as an example, noting that it took 30 years for the stethoscope to become a standard of care because clinicians insisted that it was disruptive and ‘...interfered with the practice of medicine’. Now it is a universal symbol.

What disruptive health technologies are the modern-day stethoscope?

Patients of today and tomorrow do not have decades to wait for the next innovation that will change medicine. There is a huge opportunity cost in foregoing the benefits of innovation simply by waiting too long for it.

Horizon scanning means hope for patients

Innovative treatments for challenging disease areas are just around the corner, but only if our system has the appropriate processes and resources in place when they arrive.



“It feels like gene therapy is just around the corner, but the corner keeps moving.”

– Dr Krishan Thiru, Pfizer

Unfortunately, every extra month, quarter, or year of delay in making innovative treatments available means that some current patients will no longer be eligible for treatment. We cannot predict the future, but we owe it to Australian patients to be forward looking, and horizon scanning can provide the lens through which to focus.



Theme 2:

Meaningful co-design of fit-for-purpose horizon scanning

The Strategic Agreement between the Commonwealth and Medicines Australia highlighted a shared ambition to promote a greater understanding of emerging health innovations and faster access for Australian patients.¹

With *Medicines of Tomorrow*, Medicines Australia has realised the first step of this commitment. As there was consensus among all stakeholders around the need for horizon scanning in Australia, there is a real opportunity to achieve multi-stakeholder dialogue on how horizon scanning should be designed and what it should achieve.

Professor Andrew Wilson, Chair of the Pharmaceutical Benefits Advisory Committee (PBAC), acknowledged that there is probably not a one size fits all approach to horizon scanning and that regulators and funders have different needs regarding the information they require to inform their decisions.

Partnership and shared goals

Collaboration and co-design are crucial to developing solutions with shared goals. Horizon scanning is a necessity if we are to enable faster access to innovative health technologies.

This was further highlighted by Dr Franz Pichler, in sharing international horizon scanning endeavours, noting that horizon scanning can be used in a variety of different ways to support decision-making related to new medicines. On one hand, transactional horizon scanning considers workload and financial planning to prepare for incremental innovation. On the other hand, transformational horizon scanning considers capabilities, processes, and service delivery to prepare for disruptive innovation.



“Disruptive innovation is meaningless without action.”

– Elizabeth de Somer, Medicines Australia

¹ Australian Government Department of Health and Aged Care, 2021. Medicines Australia Strategic Agreement. <https://www.pbs.gov.au/general/medicines-industry-strategic-agreement-files/MA-Strategic-Agreement-Signed.pdf>

“What horizon scanning can achieve ... will also depend on practical design [including] how information is gathered, how it’s analysed and shared. Beyond that ... the use of all that [information] will also depend on the user.”

– Dr Nick Simpson, Department of Health and Aged Care

Partnering with patients

Another important theme of the event was the need to involve patients at the highest level of decision-making. Making appropriate decisions can only occur when patients are at the table.

“Patient centricity isn’t a task; it’s an integral way of working”, implored Mark Brooke, CEO of Lung Foundation. If we want horizon scanning to be purposeful and influential, then we must understand how partnering with patients can help to recognise and understand the greater social and societal benefits of innovative healthcare.

As we navigate towards a future where the focus on value-based healthcare becomes increasingly important, we need an agile, pragmatic, and adaptable approach to horizon scanning with patients involved from the beginning.

Shifting the focus

Horizon scanning will facilitate a necessary shift to defining what is significant to patients. The patient, their family or carer will likely have a very different view than the clinician or the Government. Elizabeth de Somer questioned, “how do we measure and agree on what defines an outcome?”

Mark Brooke recommended a more agile and consumer-centric approach to facilitate faster access to innovative medicines. “We shouldn’t be seeing people have to dip into their life savings to fund lifesaving medicines”, he said. We need to be able to fast-track and reimburse medicines according to the needs of patients and acknowledge that patients are taxpayers.

Understanding the ability, ambitions, and life goals of the person, not just viewing them as a dollar commodity, is critical for getting the focus of horizon scanning right.



“Patients are the payer.”

– Mark Brooke, Lung Foundation



Theme 3:

Preparedness and planning are critical to the delivery of the medicines of tomorrow

The question of whether Australia is ready to evaluate, accept, and provide access to new health technologies was a consistent theme of *Medicines of Tomorrow*. Presenters highlighted the swiftness with which innovation is occurring and how we must adapt Australia's systems to ensure that we keep pace. It was acknowledged that if we are going to do this right, we must look beyond cost containment and understand the indirect benefits to patients, society, and the economy. Importantly, we must understand the lived experience of Australian patients.

Linking systems for improved efficiency

An insightful case study on research led by a team at the University of Melbourne, PRIMCAT,² demonstrated a multi-institutional research collaborative aimed at forecasting demand for select cancer treatments by stage of the disease. This data-driven program highlights how horizon scanning can be performed by a small team and utilised to predict new and emerging medicines.

The success of PRIMCAT is only possible using linked datasets. By utilising these datasets, a small team with limited resources can perform horizon scanning. In other words, PRIMCAT demonstrates that horizon scanning does not need to be resource intensive.

² Predicting population health economic Impact of current and new Cancer Treatments

Supporting innovation in a rapidly changing environment

Innovative health technologies are challenging health technology assessment (HTA) systems worldwide. Governments must be ambitious, agile, and future-focused to plan and facilitate faster access to innovative health technologies, including a quality horizon scanning framework.

In Europe, the United States and Canada, horizon scanning is being integrated into HTA systems. We must learn from overseas and adopt aspects of these processes relevant to the Australian context.



“We need funding and service delivery solutions that are as innovative as the treatments themselves.”

– Dr Krishan Thiru, Pfizer

If we do not have the capability to predict, then we will not have a pathway ready. The upcoming independent [HTA Review](#) must consider how to prepare the system for what is to come. Horizon scanning will assist in navigating healthcare trends, developments, and emerging threats so we are ready when these innovations arrive.

Supporting the system

Previous government-coordinated horizon scanning systems, such as HealthPACT, have fallen by the wayside in Australia, with current endeavours performed predominantly by university-led HTA groups. Presenters at *Medicines of Tomorrow* challenged attendees to consider whether Australia is committed to investing in a nationally coordinated horizon scanning framework, asking if we are prepared to invest and to work in partnership to evaluate, accept, and adopt new technologies.

In a key panel session, Dr Paul Fennessy, formally of the Victorian Department of Health, reflected on how horizon scanning has been useful to inform investment decisions and policymaking in a public hospital setting at a State and Territory level. There is a need for a coordinated horizon scanning function, which the Commonwealth Government is in a prime position to lead with other key stakeholders providing support as needed.

A similar sentiment was shared by former Chair of HealthPACT, Professor Brendon Kearney, who suggested that the Commonwealth Government needs to show leadership for horizon scanning to work as previous structures have been too political.

Laying the foundation

Medicines of Tomorrow established that horizon scanning must be more than just a pipeline of medicines. Looking at trends in disease areas, populations, healthcare, workforce, and technology solutions to identify disruptions that could challenge our health system is also critical to include in any horizon scanning framework.

What horizon scanning can achieve depends on practical design and how the information is gathered, analysed, and shared through to how the information is used and by whom. Defining these parameters is needed to progress to the next phase of horizon scanning in Australia.

Fostering engagement with the Commonwealth

In the final panel session for the event, Dr Nick Simpson from the Department alluded to the numerous parts of the system that will have an interest in the results from a nationally coordinated horizon scanning system.

From the Therapeutic Goods Administration (TGA) to the processes of the PBAC and the Medical Services Advisory Committee (MSAC) through to the Lifesaving Drugs Program (LSDP), engagement will flow naturally from the promise of benefit. If the purpose and aim of horizon scanning are evident, including the scope, design and method, and the value to patients is clear, it is a logical next step for the Commonwealth Government to progress.

Where to next?

There is a unique opportunity to harness the momentum of *Medicines of Tomorrow* and embrace the spirit of collaboration that the event inspired.

The forum demonstrated the value and importance of nationally coordinated horizon scanning in Australia, with shared support from the presenters, panel members and attendees.

While there was an acknowledgement that change will take time, the success of *Medicines of Tomorrow* highlights the imperative of preparing now.

Cutting-edge science holds immense promise, but that promise will not be realised unless we have the right policies, processes, and systems to ensure rapid patient access to transformative therapies.



“We don’t want to be [here] in twelve months thinking about a model [for horizon scanning]. We need to understand what that model is. It may not be perfect ... but let’s have a discussion ... and then work towards a timeline that sees it embedded and funded”.

– Mark Brooke, Lung Foundation

Recommendations

Two recommendations emerged from *Medicines of Tomorrow* that align with the Commonwealth and Medicines Australia’s shared ambition to promote greater understanding and insight into major therapeutic advances, in order to facilitate faster access for Australian patients:



Recommendation 1: Define the purpose and aims of horizon scanning

Conduct a roundtable discussion with key stakeholders to agree on the purpose, aims and framework for future Australian horizon scanning.



Recommendation 2: Develop a Horizon Scanning Roadmap

Develop a Horizon Scanning Roadmap for Australia, detailing the steps all stakeholders must take to implement nationally coordinated horizon scanning.

Through 2023 Medicines Australia will work with the Department of Health and Aged Care and other key stakeholders to ensure the momentum and enthusiasm for fit-for-purpose Australian horizon scanning is realised.

About Medicines Australia

Medicines Australia represents the research-based medicines industry in Australia. Our member companies discover, develop, 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:



Appendix

Speakers + agenda

Setting the scene for horizon scanning in Australia

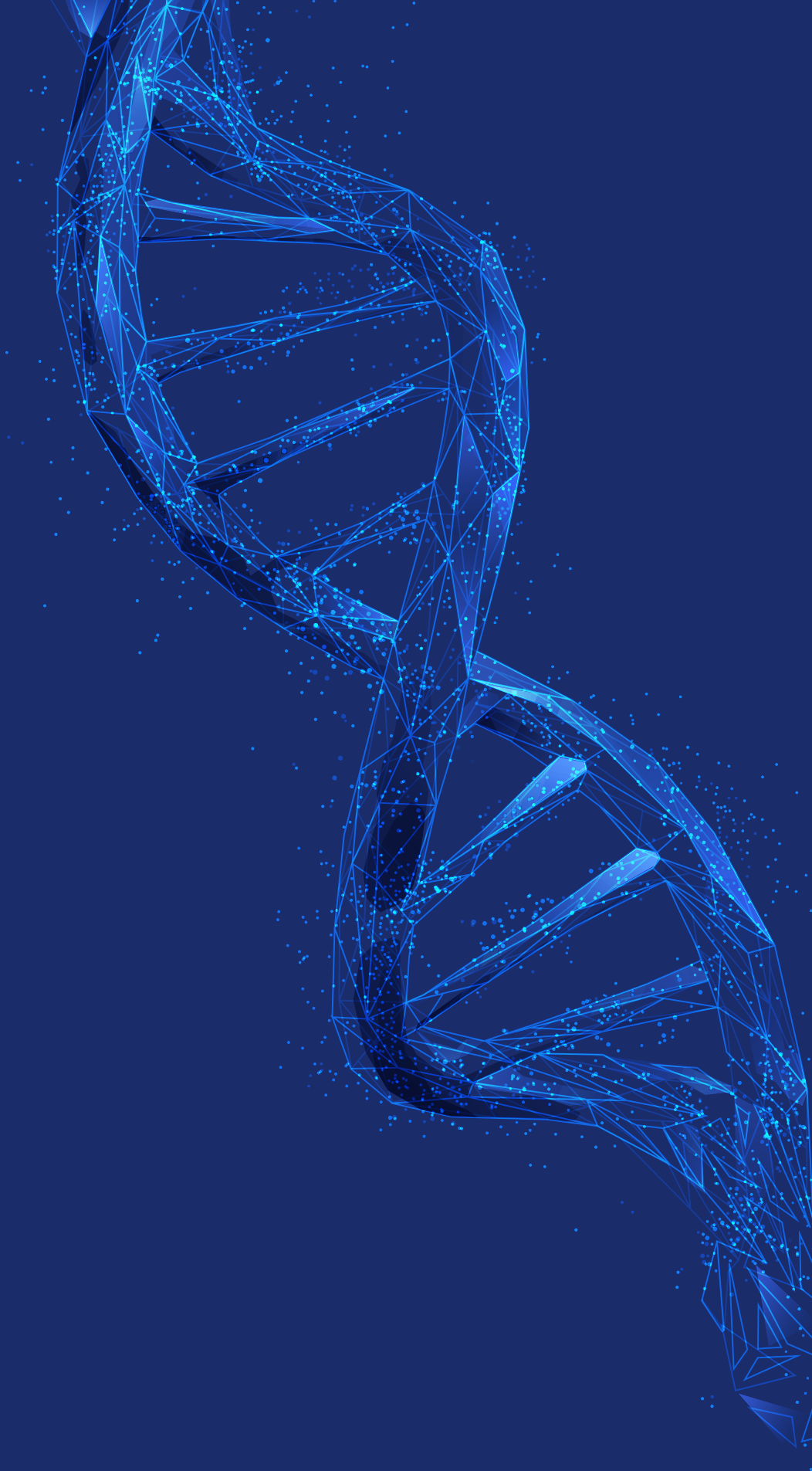
Opening	Dr Andrew Rochford, Master of Ceremonies
Welcome	The Hon. Mark Butler MP, Minister for Health and Aged Care Elizabeth de Somer (Medicines Australia)
Keynote address	Dr Bertalan Mesko, The Medical Futurist
Fireside chat: What is disruption?	Professor Brendon Kearney (SA Pathology and former Chair of HealthPACT), Elizabeth de Somer (Medicines Australia)

Medicines of tomorrow showcase

Mental health 2.0	Dr Marika Tetere (Boehringer Ingelheim)
Pioneering innovative treatments for Patients living with Duchenne muscular dystrophy: The role of gene therapy	Dr Krishan Thiru (Pfizer)
Disease-modifying therapies in Alzheimer's Disease	Associate Professor Michael Woodward (Austin Health)
Realising the benefits of combination medicines for Australian cancer patients	Dr Kylie Earle (Sanofi), Dr David Thomson (Amgen), Brendan Shaw (Shawview Consulting)
Showcase summary	Dr Andrew Rochford (MC), Elizabeth de Somer (Medicines Australia)

Horizon scanning in practice and next steps

Patient perspective on horizon scanning	Mark Brooke (Lung Foundation)
Case study of horizon scanning in Australia: PRIMCAT	Dr Fanny Franchini, Professor Grant McArthur, Dr Jennifer Soon (University of Melbourne - PRIMCAT)
Horizon scanning around the world	Dr Franz Pichler (Confluence Health Consulting)
PBAC and horizon scanning	Professor Andrew Wilson (Chair of the PBAC)
MedTech on the horizon	Paul Davies (Abbott Laboratories)
Panel session: Where to next for horizon scanning?	Dr Franz Pichler (chair), James McDonnell (CSL Vifor and Medicines Australia Board Member), Dr Nick Simpson (Department of Health and Aged Care), Dr Paul Fennessy (formerly Victorian Department of Health), Mark Brooke (Lung Foundation)
Closing Remarks	Elizabeth de Somer (Medicines Australia)



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