



# ABPI Scotland 2021 Manifesto for Medicine



Bringing medicines to *life*

Scotland

## Foreword

**The Association of the British Pharmaceutical Industry Scotland is the voice of the innovative bio-pharmaceutical sector in Scotland'. ABPI Scotland exists to make our country the best place in the world to research, develop and use new medicines and vaccines. We represent companies of all sizes who invest in discovering the medicines of the future.**

Our industry is a major pillar of the Scottish economy and collectively supports 15,250 jobs across the country with direct employment growing by 9% since 2018<sup>ii</sup>.

Our vision is for a Scotland where patients are able to quickly access the latest medicines and vaccines, which not only improve their lives, but positively contribute to economic growth and employment.

Our members are dedicated to discovering the latest breakthroughs in medicine, and that includes efforts over the past 12 months to provide vaccines and therapeutics to end the current COVID-19 pandemic<sup>iii</sup>.

Whilst the pandemic has sharpened awareness about what we do and how we do it, it is clear that we stand at a crossroads.

The need to permanently enshrine the type of collaboration which has delivered rapid advances to treat COVID-19 must be a key lesson for industry, NHS and academia. This spirit of collaboration, where the industry is viewed as a partner in health, rather than just a supplier, is incredibly important.

However, it would be remiss not to acknowledge the clear workforce and financial challenges that the NHS and Scottish Government will face once the pandemic ends. Stretched resources and a workforce which has borne the brunt of handling increased patient demand must result in changes to the way the NHS operates.

We believe that the better use of healthcare data holds the key to addressing both of these challenges.

The better use of healthcare data will provide efficiencies for clinicians, improve patient outcomes and attract pharmaceutical industry investment which can bolster the economy<sup>iv</sup>. It's a win for all concerned, but we need action and investment from government to make this a reality.

In our manifesto we outline a number of actions for the next Scottish Government to take that will improve the nation's collective health and wealth.

### **In summary we want the next Scottish Government to:**

- 1. Invest in innovative medicine as a central part of their healthcare agenda.**
- 2. Build our economic recovery around life sciences.**
- 3. Deliver a data-driven healthcare service to attract investment and improve care.**
- 4. Support Scottish medicines and vaccines R&D.**

<sup>i</sup> Association of British Pharmaceutical Industry. Available at: <https://www.abpi.org.uk/>

<sup>ii</sup> Fraser of Allander Institute, Contribution of the Pharmaceutical Industry to Scotland, Available at; <https://www.abpi.org.uk/media/8472/the-economic-contribution-of-the-pharmaceutical-sector-in-scotland.pdf>

<sup>iii</sup> ABPI COVID-19. Available at: <https://www.abpi.org.uk/medicine-discovery/covid-19/>

<sup>iv</sup> ABPI, Unlocking the Promise of Healthcare Data, 2020

# Patient access to medicines and vaccines

## The successful development and roll-out of new advanced therapies and vaccines can help treat COVID-19 and other diseases.

The recent coronavirus pandemic highlighted the speed at which the industry can respond to urgent public health issues.

### Medicines Spending is Under Control

The 2019 Voluntary Scheme for Branded Medicines Pricing and Access (VPAS) is an agreement between the ABPI and the DHSC on behalf of all four nations, including Scotland<sup>y</sup>.

In short, growth in the branded medicines bill is controlled through an industry rebate to the NHS. This industry rebate, which totaled £90m to NHS Scotland in 2020, supports the New Medicines Fund which provides health boards with financial support to enable patients to access the latest innovative treatments. VPAS was recognised by Audit Scotland as a factor in helping stabilize NHS Scotland medicines spending, which decreased by 0.8% in real terms in the last reported year.

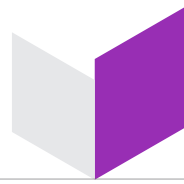
Tracking the uptake of innovative medicine is crucial to the sustainability of this arrangement and ABPI is calling on boards to publish, annually, spending on new medicines from the New Medicines Fund.

The initial lockdown period and subsequent waves of the crisis have negatively impacted patient health and accelerated disease progression in those suffering from cancer, diabetes and other conditions. The Scottish Government must ensure that, where possible, this is not repeated and work with industry to deliver innovative solutions to help vulnerable patients.

The pharmaceutical industry exists to transform human health, and that means delivering innovation to patients. For this to happen successfully, the system for approving and adopting new medicines must keep pace with advances in clinical care. The next Scottish Government should:

- Utilise industry/NHS COVID-19 collaboration to deliver the access, supply chain, companion diagnostic and treatment pathways required to ensure advanced therapies benefit patients.
- Given the strong link between pre-existing conditions and COVID-19 mortality, prioritise preventative medicine and home care solutions to ensure patients are protected from future COVID-19 risks.
- Enact the patient access and data recommendations from the Scottish Parliament Health and Sport Committee Inquiry into the Supply and Demand for Medicines.
- Build on the Scottish Genetics Partnership to deliver a centre of excellence for the manufacture and use of pioneering treatments.
- Be the first country in the UK to properly understand and track patient outcomes to enable the adoption of flexible pricing and managed access schemes.

<sup>y</sup> ABPI, 'What is the New Voluntary Scheme on Branded Medicines?' Available at: <https://www.abpi.org.uk/new-medicines/medicine-pricing-in-the-uk/what-is-the-new-voluntary-scheme-on-branded-medicines/>



# The Economy

**Following the COVID-19 pandemic, life sciences and the pharmaceutical industry can be the engine that powers economic growth provided the right policies are put in place.**

The coronavirus pandemic will place significant and long-lasting pressure on the Scottish economy and kickstarting economic growth will require a focus on areas where we have a comparative advantage. Life sciences is one of these sectors and has been recognised as one of nine growth areas by the Scottish Government.

A recent survey from the Fraser of Allander Institute revealed that the pharmaceutical industry continues to grow and contributes £1.8bn in GVA to Scotland's economy. The same survey showed that our members employ 5,600 people directly and a total of 15,250 indirectly<sup>vi</sup>. Whilst coronavirus is set to hollow-out jobs in traditional industries, healthcare is one area where the number of jobs is set to grow. Huge potential exists in this sector, but only if the Scottish Government understands what will drive growth and how to get it right. The next Scottish Government should:

- Aim to increase turnover in the life sciences sector to £16bn in the next parliament.
- Develop a pharmaceutical industry specific foreign direct investment strategy.
- Identify areas for collaboration to deliver a triple win for patients, industry and the NHS.
- Empower the NHS to work with life science companies to adopt and uptake innovation quickly.

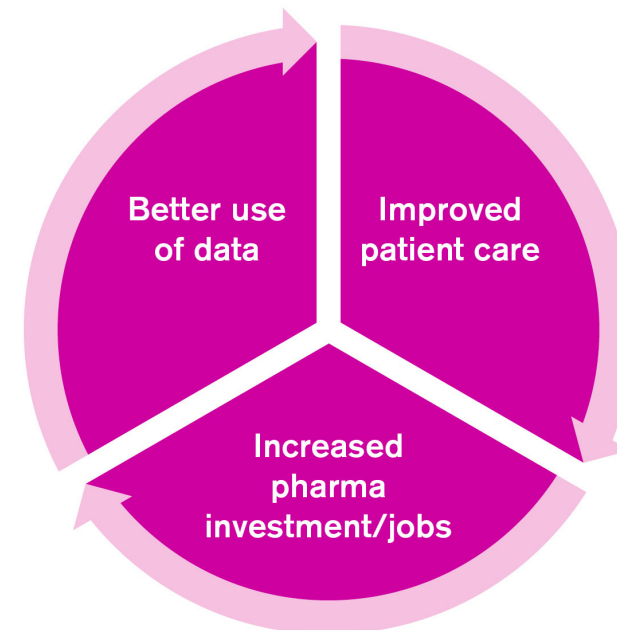
# Data

**Data will transform the way we diagnose and treat disease, but we need to build the correct infrastructure to make this a reality.**

The Coronavirus pandemic has shown that the NHS is able to change course quickly when required. However, lateral thinking and the fast adoption of innovation shouldn't be reserved solely for use in a crisis, it should be embedded within NHS decision making. COVID-19 must provide a stepping off point for the NHS to re-imagine care and the patient journey, putting data at its heart.

Chart 1 demonstrates how investment in the better use of healthcare data can not only result in improved patient care but can also stimulate increased investment from pharmaceutical companies through clinical research and innovative commercial arrangements.

**Chart 1. The benefits of improved healthcare data.**



<sup>vi</sup> Fraser of Allander Institute, The Economic Contribution of the Pharmaceutical Industry in Scotland. Available at: <https://www.abpi.org.uk/media/8472/the-economic-contribution-of-the-pharmaceutical-sector-in-scotland.pdf>



## Researching new medicines and vaccines

**The pharmaceutical industry spends more on R&D than almost any other sector and Scotland must work hard to increase its share of UK R&D. In 2018, the industry in Scotland spent £165m on R&D, up from the £120m reported in 2012<sup>vii</sup>.**

The NHS collects an enormous amount of information but unfortunately this data is curated in a way that makes it tough to access and hard to use productively. This must change if patients are to benefit from the latest advances in treatment and diagnosis.

The ability to track outcomes and optimise patient care is essential if we are to create a sustainable, innovative healthcare system in Scotland. The next Scottish Government should:

- View the digitisation of the health service as a priority, with ring-fenced funding, equal to that of lowering waiting times and other high-profile health policy issues.
- Deliver routine recording of patient outcomes and use the COVID-19 crisis to drive a revolution in the way data is used to plan treatment pathways.
- COVID-19 has accelerated the move to virtual and digital working and a Ministerial portfolio should be created that is solely devoted to improving connectivity, digital skills, the better use of data and the digital economy.
- Create a pharmaceutical industry data steering group with the NHS, mirroring the SMC UGF model, to deliver advances in the use of healthcare data.

### The pharmaceutical Industry united in the battle against COVID-19

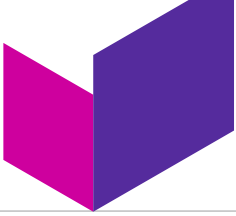
The pharmaceutical industry has mobilised the full strength of its R&D infrastructure to develop new vaccines and treatments whilst also working to repurpose existing medicines to combat novel Coronavirus. In addition to these efforts, the industry has used its testing network and redeployed clinical staff to the NHS in order to battle the disease.

The Coronavirus pandemic has demonstrated why a thriving life sciences sector is needed to respond to global public health challenges. It has also shown what can be achieved when industry, academia and the NHS work together. This spirit of collaboration should not solely be reserved for times of crisis but should underpin all future working within the NHS.

Scotland is an attractive place to research and develop the latest medicines. It has a strong academic base including some of the world's best universities and has a healthcare system that is large enough to be globally significant yet small enough to respond nimbly to breaking science.

However, despite this advantage, more needs to be done to ensure that Scotland remains a leader in medical science. A strong and vibrant life sciences sector is vital for public health and collaboration between academia, industry and the NHS is not a bonus, but a must have.

<sup>vii</sup> Fraser of Allander Institute (2018), The Economic Contribution of the pharmaceutical industry in Scotland, <https://www.abpi.org.uk/media/6494/fai-the-economic-contribution-of-the-pharmaceutical-industry-in-scotland.pdf>



Collaborating more effectively can enable the NHS to tackle disease and prepare for innovative treatments, including gene therapy. To enable this the next Scottish Government should:

- Improve the uptake and adoption of innovative medicine as R&D is far more likely to take place in a location where new treatments are routinely used.
- Promote and encourage NHS collaboration with industry and academia with the aim of annually increasing the number of collaborations and joint-working projects.
- Increase the scope of the Chief Scientist by making it a full-time role.

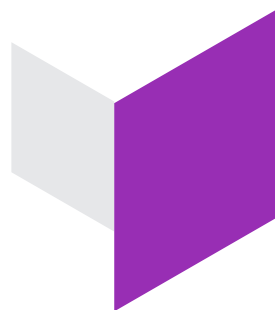


### Clinical Trial restart and recovery

Clinical trials enable patients to benefit from the latest medical breakthroughs and cutting-edge science. Trials save NHS Scotland millions of pounds in treatment costs, enable health boards to raise revenue and more importantly provide patients access to life saving treatment<sup>viii</sup>.

With clinical staff focused on handling coronavirus, most non-COVID-19 trials have been stopped. As circumstances change, it will be important for Scotland to invest in its infrastructure and capacity to enable clinical trials to thrive. This will present the NHS with a challenge but also a great opportunity if we can get our offer right. The next Scottish Government should:

- Quickly and clearly resume clinical trials, and “lock in” any beneficial changes that have been introduced as part of COVID-19 trials.
- Double the value of commercial medicinal trials over the course of the next parliament, through the simplification of trial set up and use of data to improve trial recruitment.
- Compile an annual publication (similar to the work of NIHR) detailing the value of trials to Scotland, in both financial and health terms.



<sup>viii</sup> National Institute for Healthcare Research, Impact and value of the NIHR Clinical Research Network. Available at: <https://www.nihr.ac.uk/news/new-report-highlights-how-nihr-support-for-clinical-research-benefits-the-uk-economy-and-nhs/22489>