

ABPI Scotland: A blueprint for health

January 2024



About the Association of the British Pharmaceutical Industry (ABPI)



The ABPI exists to make the UK the best place in the world to research, develop and use new medicines and vaccines.

We represent companies of all sizes that invest in discovering the medicines of the future.

Our members supply cutting-edge treatments that improve and save the lives of millions of people. We work in partnership with government and the NHS so patients can get new treatments faster and the NHS can plan how much it spends on medicines.

Every day, we partner with organisations in the life sciences community and beyond to transform lives across the UK.

Foreword



The world is entering an era where our understanding of genomics and cellular science will offer new treatments, sometimes cures, for a range of life-limiting illnesses. Precision medicine will play a central role in the delivery of the Scottish Government's Value Based Health and Care programme.

The triple helix of NHS, academia and the pharmaceutical industry is central to Scotland's life science growth ambitions, with global medicines companies looking to invest by placing research studies and clinical trials in Scotland.

There is a huge opportunity for Scotland's people and economy to be a leader in data systems and genomic diagnostics, as well as adopting policies that support access to innovation for patients.

The extent to which Scotland benefits – and perhaps leads – will ultimately be down to whether policymakers choose to adopt and fully harness the potential of research and innovation in healthcare.



To create the conditions for success, we envision a Scotland where:

- the potential of life sciences is maximised as an engine for growth, including as a destination for **research and development** and **advanced manufacturing**
- data-driven healthcare** is standard
- rapid patient access** to new medicines is a right that is delivered
- a sustainable approach** to medicines provision is fostered across procurement and clinical care



Alison Culpan
Director of ABPI Scotland

1. Sustainability



Climate change is a global concern and, as global businesses, pharmaceutical companies are acting at a global level.

Realistic Medicine as part of Value Based Health and Care, is at the heart of NHS Scotland's target to achieve net zero by 2040 and is a key focus of this year's [report](#) by the Chief Medical Officer for Scotland (CMO).

Sustainability is fundamental to our industry's research, manufacturing and supply systems. Our members are working with governments and healthcare systems all over the world to decarbonise our supply chains, reduce the impact of manufacturing processes and become nature-positive.

Medicines account for around 25 per cent of carbon emissions in the NHS.¹ The building blocks are being put in place for assessing supply chains to demonstrate social value – promoting sustainable prescribing and medication reviews and empowering patients.

ABPI members are playing their part in Scotland's ambition of leading the world in sustainable, value-based healthcare.

The ABPI's vision for Scotland:

- Industry is seen as a key and equal partner in working toward a net-zero healthcare system by 2040.

How we get there:

- Scotland encourages standardised approaches across the whole UK when it comes to suppliers evidencing their sustainability actions.

¹ NHS England, 'Models of care', available at <https://www.england.nhs.uk/greenernhs/a-net-zero-nhs/areas-of-focus>

2. Research and development



Innovation underpins the success of our life sciences ecosystem – and improves lives.

Clinical trials are an essential part of the research and development (R&D) of new medicines and vaccines and represent around half of the pharmaceutical industry's spending on R&D, bringing benefits to patients, the NHS and the economy.

- In 2022/23, 16,000 fewer people in the UK were participating in industry clinical trials compared to 58,048 participants in 2017/18.²
- The UK's global rank for phase III trials – those with medicines closest to market – has fallen from fourth to tenth since 2017/18.

The **UK-wide Lord O'Shaughnessy review** set out 27 recommendations intended to deliver major sustained growth in commercial trial activity.

In response, Health Secretary Michael Matheson MSP acknowledged the fundamental role of attracting and delivering clinical research trials in the recovery and reform of the NHS in Scotland – and the part trials can play in improving patient outcomes and boosting the economy.

Scotland's Chief Scientist for Health, Dame Anna Dominiczak, highlighted Scotland's well-established model of partnership working across the triple helix of the NHS, industry and academia, which she said must be maximised to create an environment where innovative commercial trials thrive.

The ABPI's vision for Scotland:

- Every patient in Scotland should have the opportunity to take part in clinical research.

How we get there:

- The Scottish Government should update and publish a refresh of 'A Common Understanding'.
- Scotland must set targets for clinical trial recruitment, empowering and rewarding the NHS to play its full role as a clinical research partner.
- Scotland's genomic laboratories should be encouraged – or mandated – to form research consortia with their local universities, cancer centres and pharmaceutical companies to create the infrastructure to attract more clinical trials.

² ABPI, 'Getting back on track: Restoring the UK's global position in industry clinical trials', November 2023, available at <https://www.abpi.org.uk/publications/getting-back-on-track-restoring-the-uk-s-global-position-in-industry-clinical-trials>

3. Data-driven healthcare



Data can transform the way we diagnose and treat disease, but the correct infrastructure must be in place to make this a reality.

The NHS collects an enormous amount of information, but this data is recorded in a way that makes it challenging to access and hard to use productively. This can be a barrier to patients benefitting from the latest advances in treatment and diagnosis.

The societal and economic benefits of supporting industry to use this data in research and innovation is recognised in Scotland's [health and social care data strategy](#), but industry faces barriers when it seeks to access data safely.

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



The ABPI's vision for Scotland:

- Patient outcomes are routinely recorded and curated as a national priority and anonymised datasets are made accessible to approved researchers from industry and academia.

How we get there:

- Scotland's Health Secretary must urgently oversee a step change in the delivery of data policy, with Scotland's Chief Scientist for Health funded to enact a 'Once for Scotland' programme to unlock data for healthcare and research.
- Ministers should provide annual updates on the NHS Scotland data strategy, particularly outcomes measurements.
- The NHS and government, working with Research Data Scotland, must set out how industry can work as research partners to use de-identified NHS data for the benefit of all in Scotland.

4. New medicines access and uptake



Patients should have unequivocal access to the most effective medicines while NHS staff should benefit from being able to use the best tools and technologies.

The pandemic has negatively impacted the health of Scotland's population, accelerating progression in people with cancer, diabetes, and other conditions.

The pharmaceutical industry exists to transform human health, and getting innovative new treatments to patients is our core mission.

However, the UK is perceived by industry to place less value on innovative medicines, with slow access and lower and more variable uptake – despite this leading to poorer outcomes.

- It takes on average 407 days for a medicine in Scotland to become available to a prescriber after marketing authorisation.³
- For genomic medicines, which require companion diagnostic testing, Scotland has fallen behind comparable nations.

Decision-making on new medicines in Scotland must keep pace with advances in clinical care, while working to reduce unwarranted variation in access faced by patients.

The ABPI's vision for Scotland:

- Patients in Scotland can routinely and equitably access the most innovative medicines most suitable for them that have been accepted by Scottish Medicines Consortium (SMC).

How we get there:

- Mandate health boards to publish their spending under the New Medicines Fund.
- Audit NHS boards on their adherence to CMO guidance for local decision-making on new medicines.
- Ensure Scotland's Genomic Medicine Strategy and Implementation Plan are funded adequately and sustainably, accompanied by annual reporting.

³ EFPIA, 'EFPIA patients 'W.A.I.T indicator 2022 survey', April 2023, available at https://www.efpia.eu/media/s4qfleao/efpia_patient_wait_indicator_final_report.pdf

Case studies

Scotland's New Medicines Fund

In the years 2018/19 to 2021/22, Scotland's NHS received £255 million in rebates from industry under a UK-wide scheme that caps the branded medicines bill. In the year 2023/2024, the UK-wide rebate will be in the order of £3.3 billion.

The Scottish Government has chosen to reinvest receipts back into the NHS through the New Medicines Fund, which provides health boards with financial support to enable patients to access the latest innovative treatments. NHS boards received £50 million in 2021/22.

However, health boards do not currently publish details of their spending on new medicines that fall under the fund.

It is crucial Scotland's NHS makes the best use of these payments and learns from ambitious and successful initiatives like the **New Treatment Fund in Wales**, which ensures new drugs are made available to patients within two months of approval through funding pathway redesign and improvement and supporting service readiness.

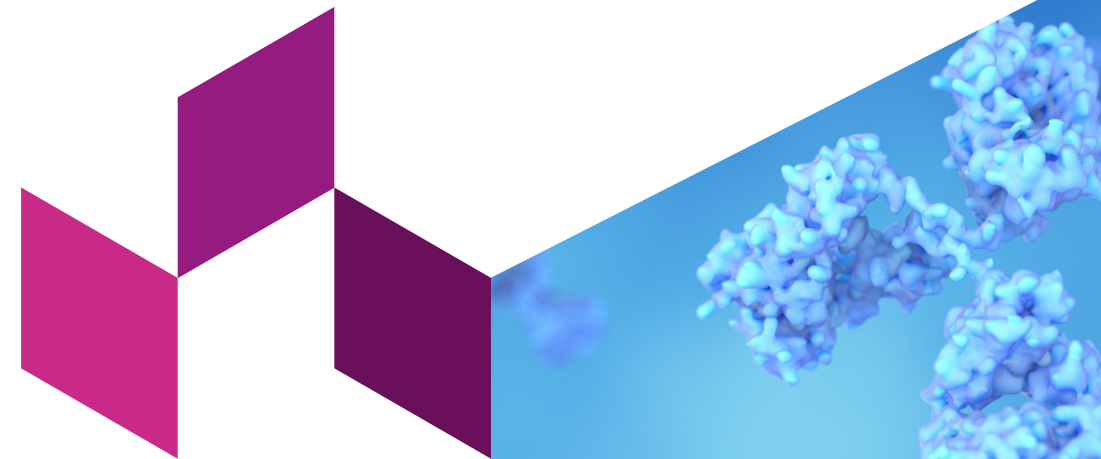
CAR-T

Since the first CAR-T medicine was accepted for use in NHS Scotland in February 2019, more than 40 people have benefitted from the revolutionary new treatment that genetically engineers patients' own immune cells to kill their cancer.

A formal collaboration across Scotland, spearheaded by industry, has now been established to deliver a proof-of-concept solution that will look to:

- ▀ standardise CAR-T data collection across Scotland
- ▀ create a template that can be rolled out to other disease groups to support drug trials, medical interventions and tools

The platform, set to launch in 2024, will offer clinical data to improve patient outcomes but also give industry what it needs to deliver innovative pricing arrangements.



Case studies in sustainability

GSK

As part of **GSK's** commitment to a net zero impact on climate, the company has set a target to transition to 100 per cent renewable electricity by 2025.

In September 2021, it announced a major £50 million investment at manufacturing sites in Scotland and the US to secure renewable power generation. This includes a 20-year power purchase agreement to build, run and maintain a 28MW solar and wind turbine facility at GSK's Irvine site.

When fully operational, this project will reduce GSK's carbon footprint by around 10,000 tonnes of carbon annually. GSK is also working on a solar farm project at its Barnard Castle site, which would generate up to 16MWp of renewable energy.

Johnson & Johnson Innovative Medicine

Building on more than two decades of achieving carbon reduction targets, **Johnson & Johnson Innovative Medicine** Health for Humanity climate goals are seeing the company transitioning to renewable electricity and carbon neutrality in its global operations while also working with suppliers to reduce its upstream carbon emissions.

More than 65 per cent of Johnson & Johnson Innovative Medicine's global electricity comes from renewable sources. In 2023 it reached the milestone of 100 per cent renewable electricity for all operations in Europe. Overall, Johnson & Johnson Innovative Medicine reduced the carbon footprint of its operations by more than 40 per cent between 2016 and 2022.



Chiesi Limited

Chiesi Limited, alongside NHS trusts and a local pharmaceutical committee in Leicestershire and Rutland, provided pharmacies with pre-paid, pre-addressed envelopes to give to patients to recycle their inhalers.

All inhaler types could be returned and most were recycled at an energy-from-waste facility. Propellant gas from pressurised metered dose inhalers was extracted for reuse in non-pharmaceutical industries, including refrigeration and air conditioning.

Over a two-year period, Chiesi's scheme recycled 52,148 inhalers, saving 305.3 tCO₂e from entering the atmosphere.

Pfizer

Pfizer reduced direct greenhouse gas (GHG) emissions by more than 60 per cent over the period from 2001 to 2020 (2000 baseline) and, as one of the first companies to receive validation of GHG reduction goals by the Science Based Target Initiative in 2015, Pfizer remains committed to ambitious long-term actions.

The company has set an ambition to achieve the net-zero standard by 2040.

To meet this goal, Pfizer is targeting a 95 per cent reduction in direct (scope 1 and 2) emissions and a 90 per cent reduction in emissions across the value chain by 2040.





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We represent companies of all sizes which invest in making and discovering medicines and vaccines to enhance and save the lives of millions of people around the world.

In England, Scotland, Wales and Northern Ireland, we work in partnership with governments and the NHS so that patients can get new treatments faster and the NHS can plan how much it spends on medicines. Every day, our members partner with healthcare professionals, academics and patient organisations to find new solutions to unmet health needs.

www.abpi.org.uk



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