

Overcoming Biomarker Barriers Through Collaboration

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CQDM Forum
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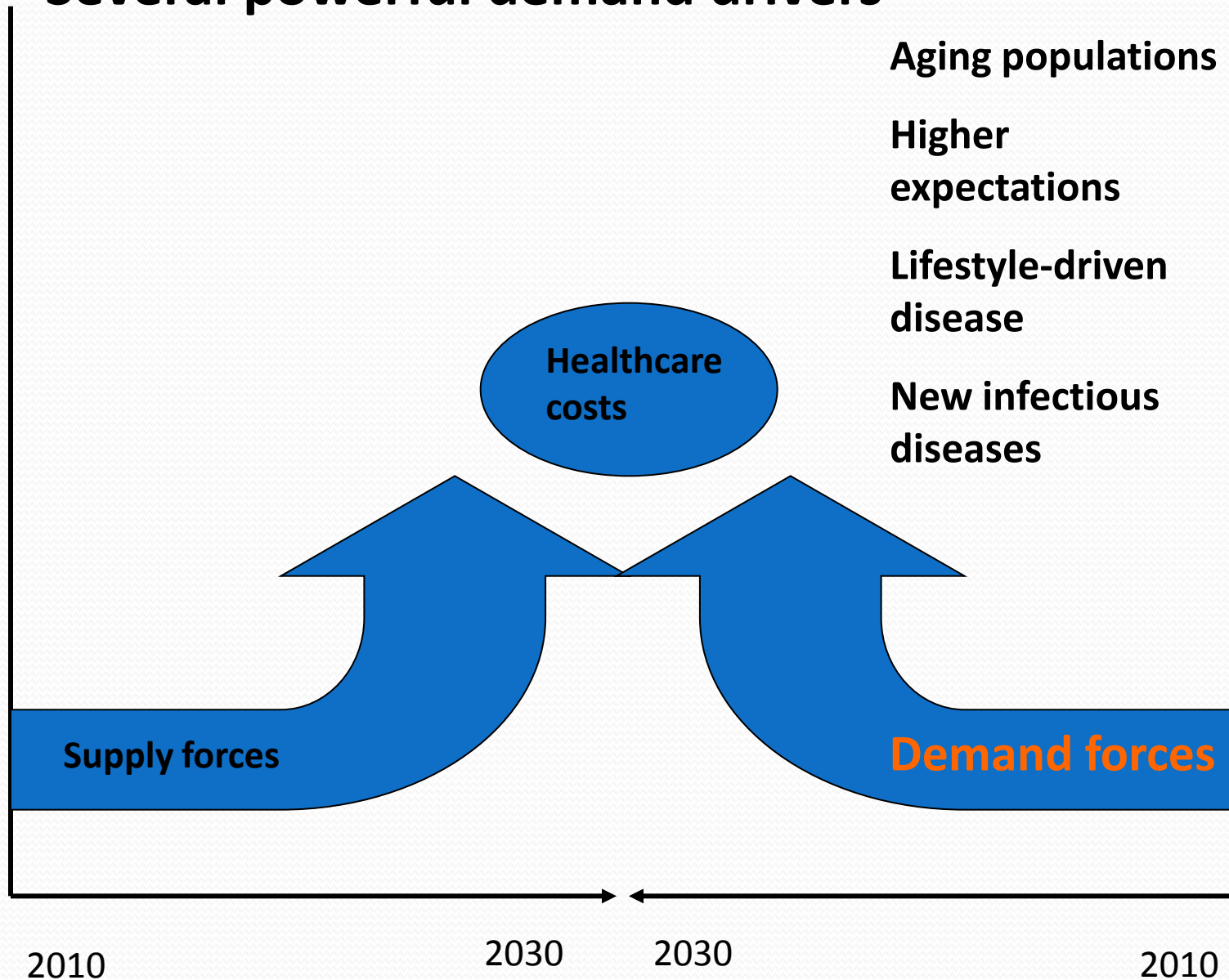
Personal background + lessons

- McKinsey consultant
 - Chiron Dx CEO
 - iKnowMed CEO
 - Molecular Staging CEO
 - Director General ABPI
- Economics rule OK
 - Rx and Dx economics ▲
 - Cancer a fruitful field
 - Pharmacos cautious
 - Governments supportive
 - Payers expect lower cost
 - Regulators unready
 - Physicians ill-informed
 - Technology not the limiting factor

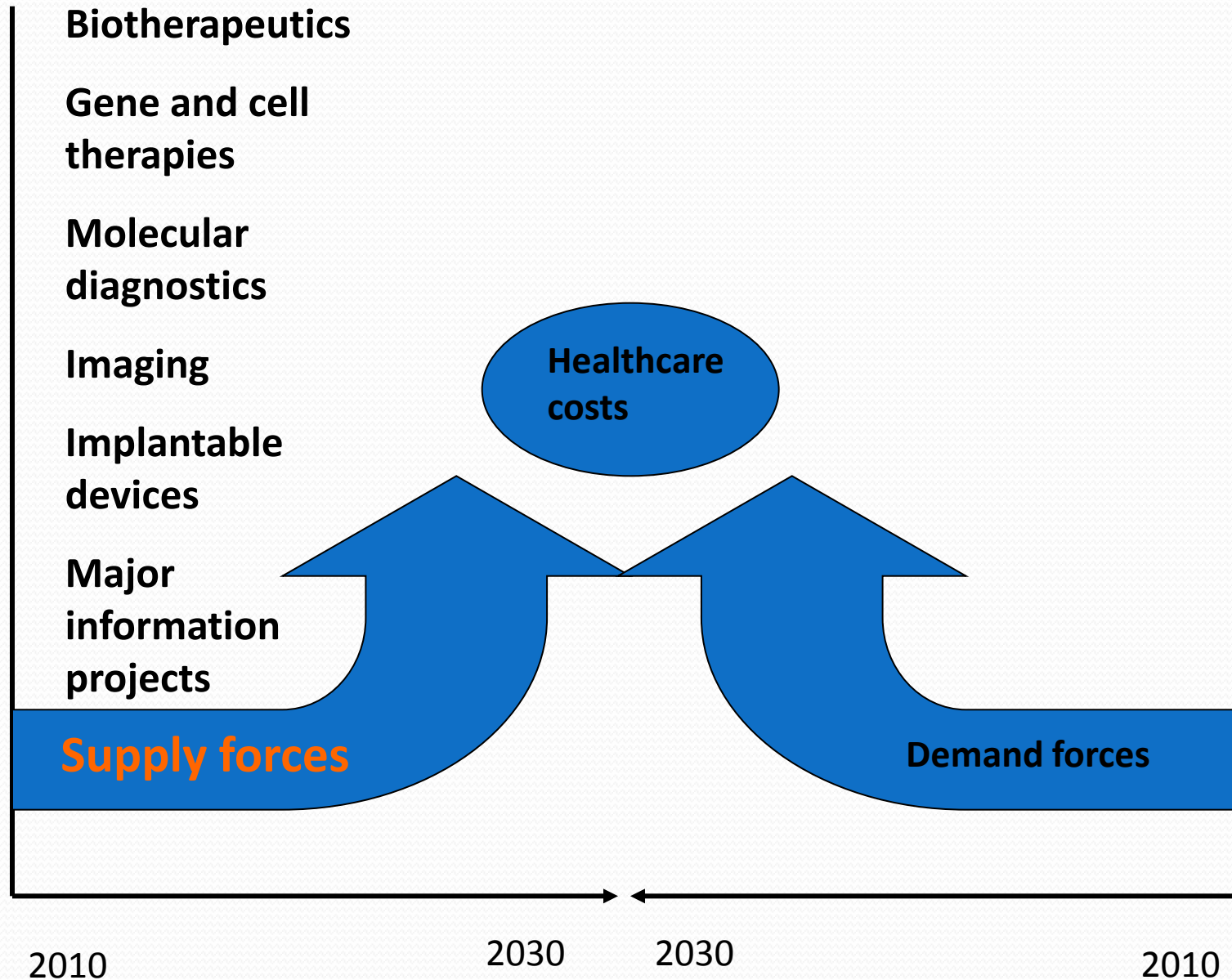
First, the economics

- Supply and demand creating a potential meltdown of health systems
- Personalised medicine prospectively part of the solution
- Focused development of new medicines vital to improve R&D productivity and control costs

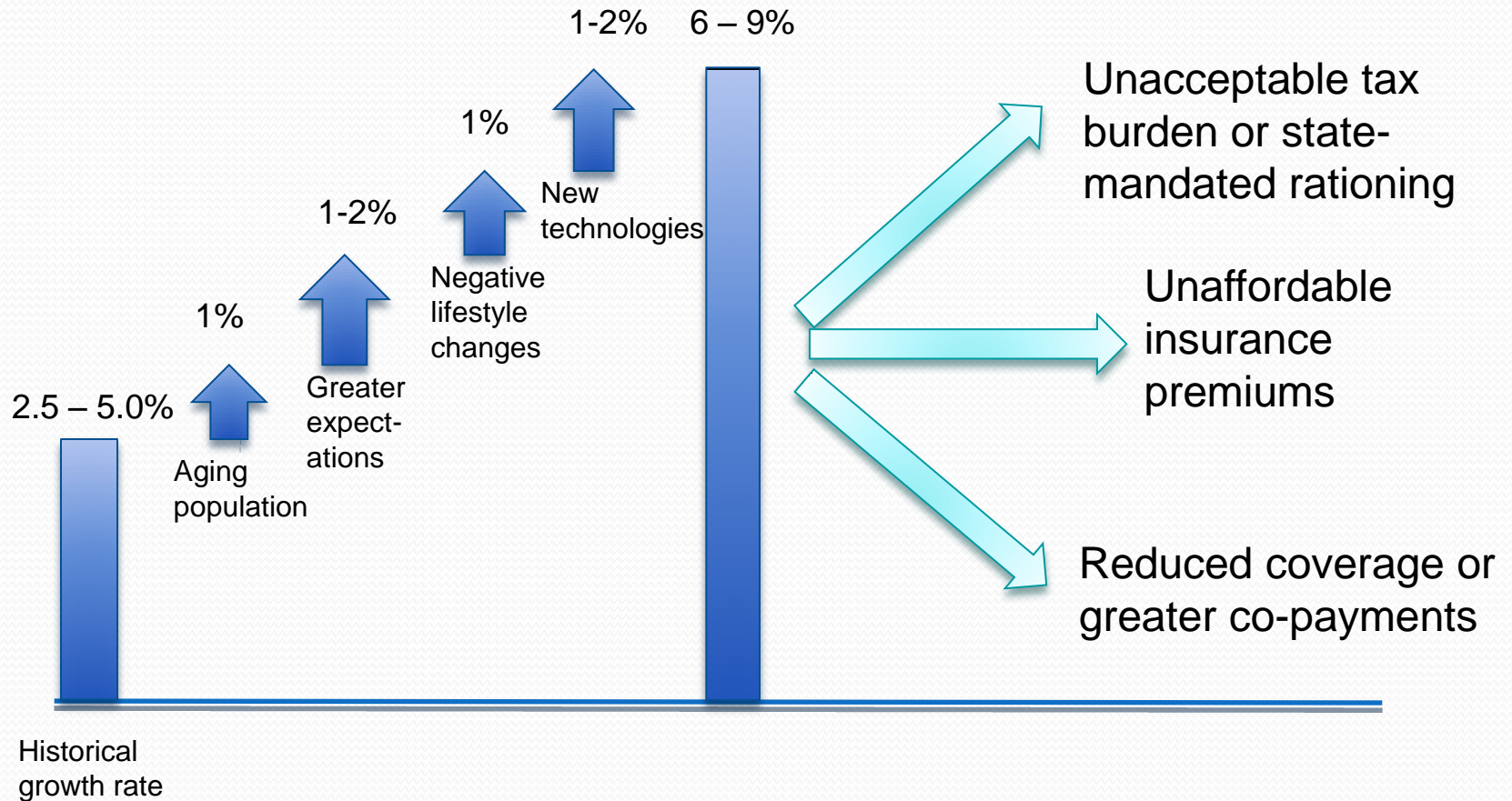
Several powerful demand drivers



Supply of new technologies also adds to healthcare costs

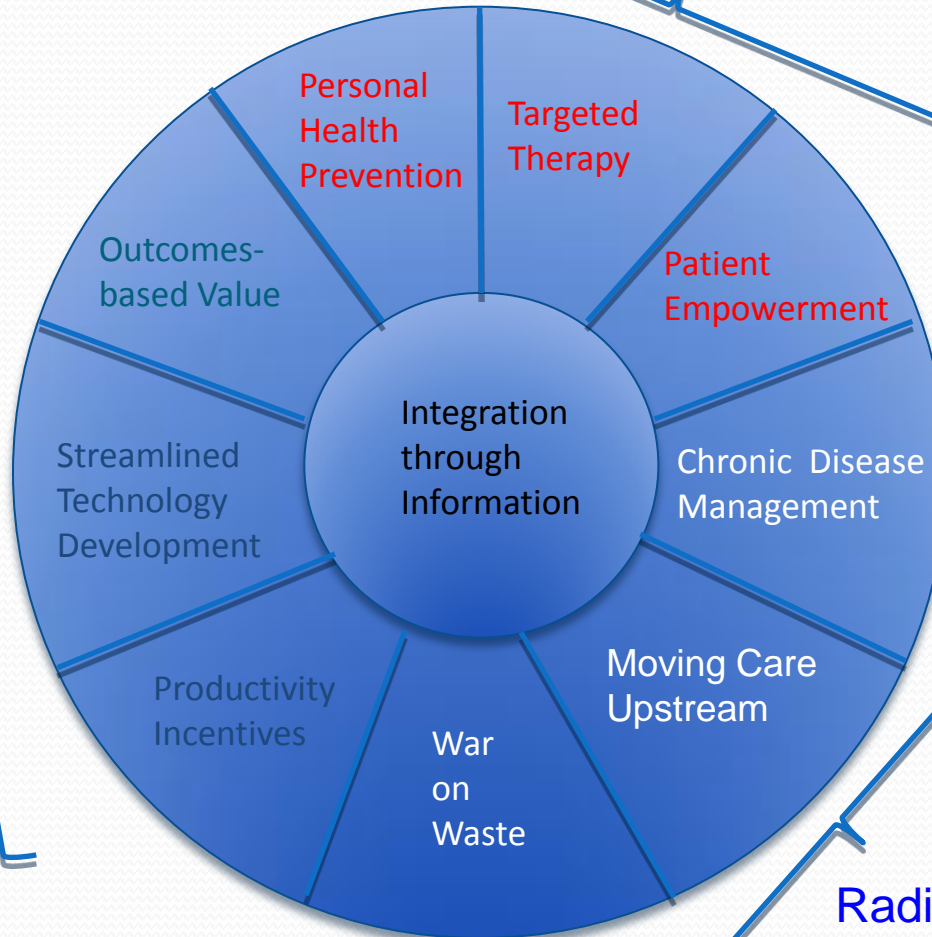


Demand and supply drivers combine to create unsustainable real terms growth



The 10 Steps to Greater Healthcare Productivity

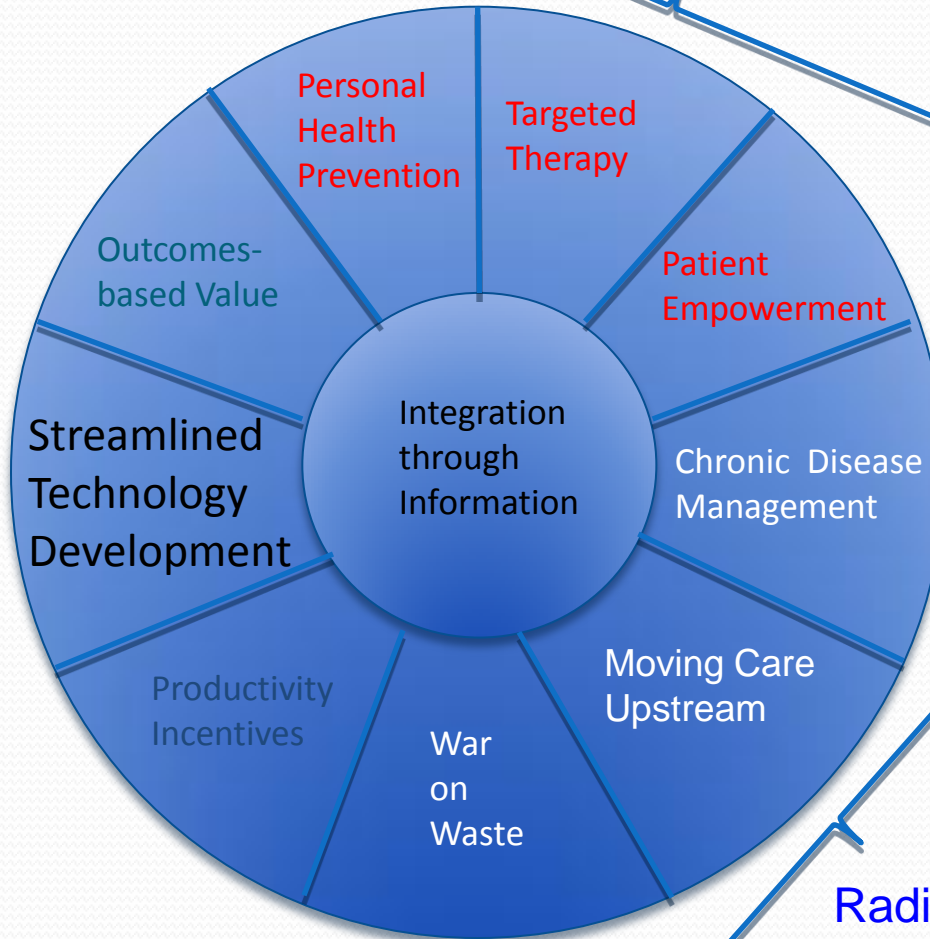
Focusing on performance



Making healthcare a personal matter

Radically redesigning healthcare delivery

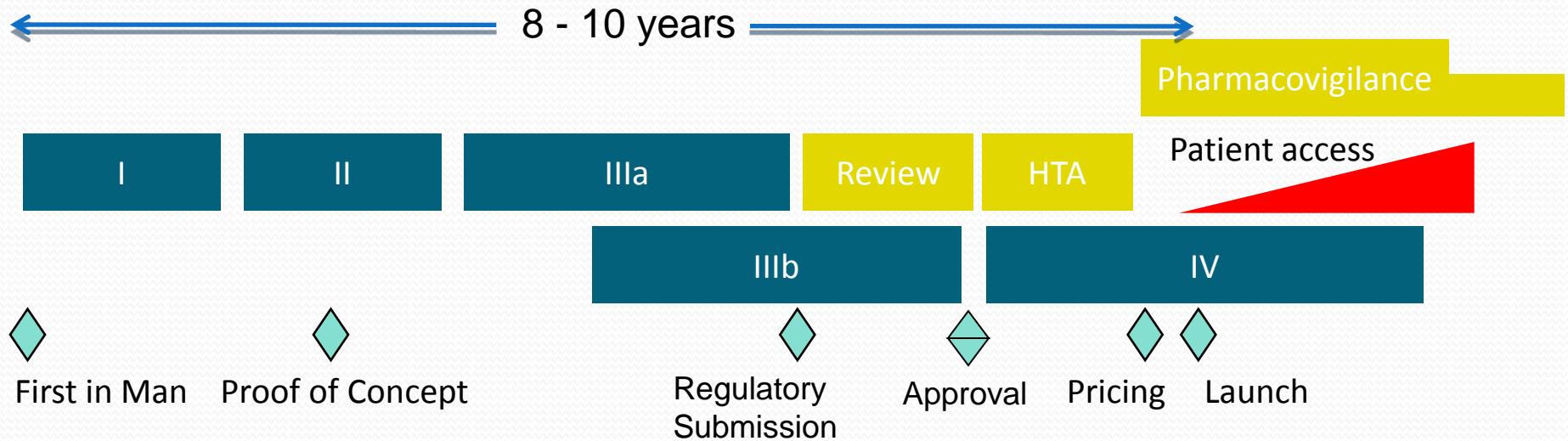
The 10 Steps to Greater Healthcare Productivity



Making healthcare a personal matter

Radically redesigning healthcare delivery

Current medicines development path



Key characteristics of current model

- Inflexible processes and methods
- Expensive, increasing data demands
- Lack of early alignment between key parties
- Segmented input & decision making
- Access needs not designed in
- Patient perspective not fully addressed

◆ Key milestones

External activities

Sponsor activities

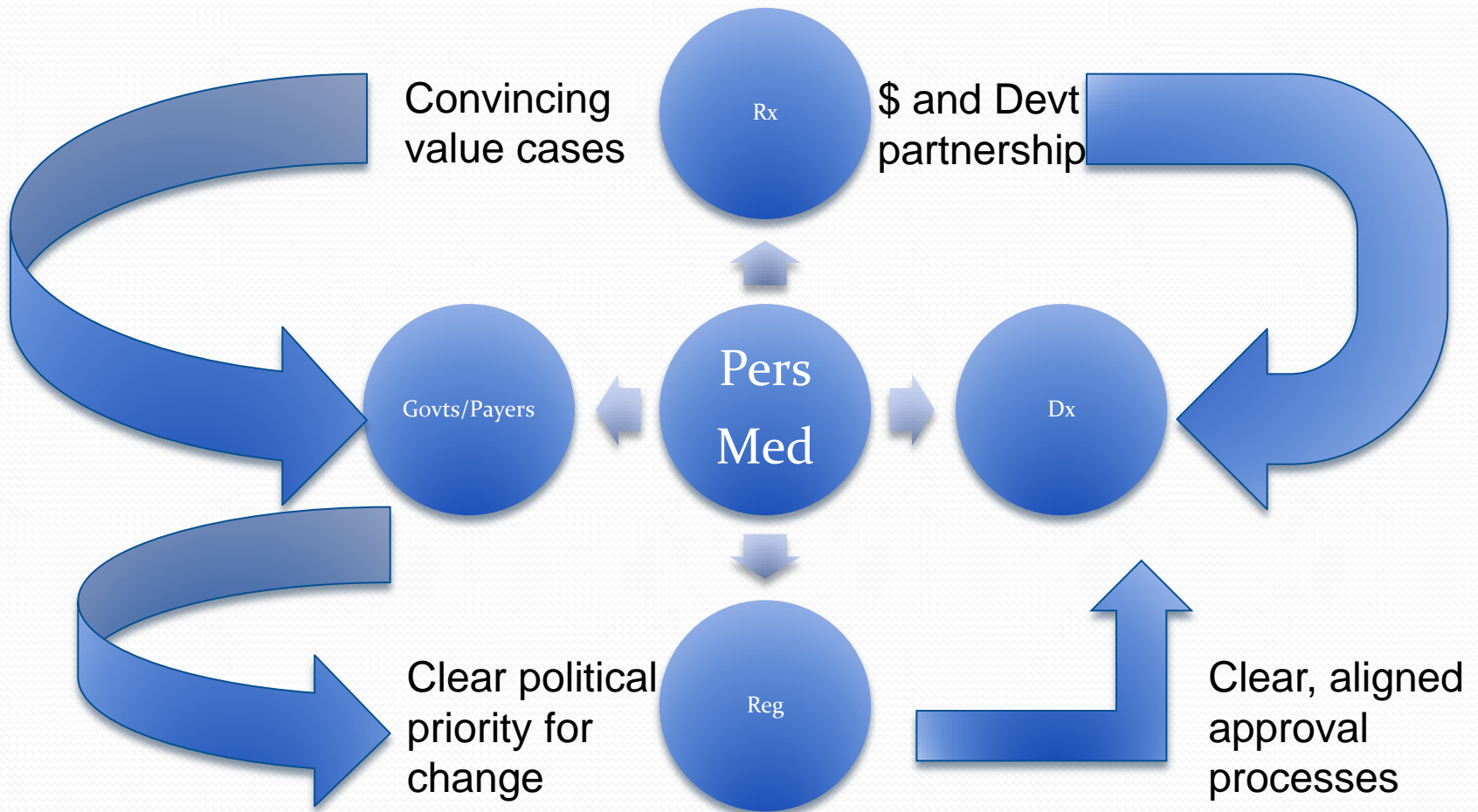
Technology not the issue ...

- Genomic, proteomic, imaging and metabolomic tools now available
- Clear demonstration of value, esp in cancer
- Substantial academic and research charity interest
- Governments prepared to invest in discovery
- Most pharma companies claim active biomarker programs ('no molecule progresses without one')

The barriers lie elsewhere ...

- Real efficacy biomarkers often emerge after expensive development stages, rather than before them
- Validation an unclear and expensive process, with funding limited
- Rx and Dx regulation still separate processes
- Pharma companies still competing rather than collaborating to create standard markers
- Health technology assessment will be complex in cases of differential efficacy

Collaboration the only answer



The book of the film ...



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Thanks for listening