

Belgium - Life Sciences  
Vol. 1 – Issue 7 – 22<sup>nd</sup> January 2010

# Life Sciences Insights



Welcome to the seventh Belgian newsletter for the Life Sciences industry, published by Deloitte! We publish this newsletter every 2 months and we hope this will be an enjoyable and productive reading – please [contact us](#) if you have any questions or wish to discuss any of the topics further.

## Topics

### **Ensure alignment of health economics with marketing and sales strategies: “The Game”.**

Bringing a strong value message, substantiated with health economic arguments, will help to differentiate products and to communicate evidence-based value to all stakeholders. “The Game” was developed for coaching participants without any health economic background in how to identify and transform health economic data into convincing evidence-based arguments that support reimbursement, funding, prescription, etc.

[More](#)

### **Patient-level data, through Electronic Health Record (EHR) systems, revolutionising the Life Sciences value chain**

Imagine you could use longitudinal patient level data either in research to support the identification of disease mechanisms, in clinical trials to decrease patient recruitment cycle times or in post-marketing surveillance to support outcome studies on the effectiveness of treatments.

[More](#)

### **Managing talent in a turbulent economy – Leaning into the recovery**

Since January 2009, Deloitte together with Forbes Insights have been conducting a year-long longitudinal talent series surveying global executives and talent leaders across all industries worldwide. The survey aimed to find out how executives have been managing their workforces in times of crisis and whether they have developed effective strategies for the economic upturn.

[More](#)

### Did you know?

- Deloitte was the main sponsor of the Financial Times pharmaceutical and biotechnology conference
- Researchers at the Ghent University are at the front row in research on septic shock
- Scientists mapped the genetic code for two cancers (skin and lung)

[More](#)

---

## Ensure alignment of health economics with marketing and sales strategies: “The Game”.

The need for pharmaceutical companies to provide relevant and timely data on health outcomes and health economics is becoming increasingly important. Access, or an agreement to pay for a new medicine from public funds, requires an argument based on cost-effectiveness, i.e. answering the ‘value for money’ question. This changing market approach requires a close collaboration of the health economic department with their sales and marketing colleagues who benefit from engaging with the clinical, economic and humanistic value messages of their products. A strong value message, substantiated with health economic arguments, will help to differentiate products and to communicate evidence-based value to all stakeholders. Moreover, this message needs to be tailored to the audience.

Audience	Value message					
	Life years gained	Quality of life	Incremental cost-effectiveness ratio	Budget Impact	Patient “out of pocket payment”	Cost for Public health care payer
Patient	+++	+++	-	-	+++	-
Prescriber	+++	+++	+	+	++	+
Public health care payer	+++	++	+++	+++	++	+++

In order to exploit the full benefits of health economics within a company’s marketing and sales model in an enjoyable and interactive way, “The Health Economics GAME: Gain Access to Market with Economics” (The Game) was developed by the health economic department of GSK Biologicals in close collaboration with Deloitte. During The Game, participants without any health economic background learn how to transform health economic data into convincing evidence-based arguments that support reimbursement, funding, prescription, etc... Evidence is to be structured in five key chapters, building the story flow:

- What is the current burden of the disease?
- How and where will the new treatment affect this burden?
- What is the cost-effectiveness of the new treatment compared with current care?
- What is the competitive advantage of the new treatment compared with current and near future alternatives?
- What is the budget impact of funding the new treatment?

### How “The Game” works

Players of The Game are allocated to an industry team. Their mission is to convince the ministry of health to recommend reimbursement within a limited time and an appropriate budget. The budget received is to be used for buying information (publications, abstracts, clinical trial results...) or meeting time with

different stakeholders (health economic department, patient organizations, key opinion leaders and public health authorities).

Marks are awarded to teams for demonstrating that: 1) the stakeholder perspective is well understood; 2) the strategy to achieve the objective is well defined; 3) the objective is delivered using health economic information appropriately, and 4) the team demonstrates professionalism during The Game.

The winners of The Game are the industry team members who gain the highest marks in presenting to the ministry of health a convincing argument for reimbursement.

The first sessions at GSK Biologicals were very successful: participants were very motivated and enthusiastic about the concept, and the jury were surprised by the high level of information participants managed to collect, assemble and present

This flexible business game can be customised to any portfolio and objectives or audience of interest.

Depending on the players' knowledge of health economics, an introductory training course can be organized prior to The Game. A minimum of 6 and a maximum of 20 participants can participate in one session.

For more information, please contact Cedric De Vos via phone: +32 (02) 749 53 65 or e-mail [cdevos@deloitte.com](mailto:cdevos@deloitte.com)

[back to top](#)

---

## Patient-level data, through Electronic Health Record (EHR) systems, revolutionising the Life Sciences value chain

Most Life Sciences Research & Development functions are under increasing pressure to improve innovation, reduce development inefficiencies and advance product safety. Longitudinal patient-level data, collected through Electronic Health Record (EHR) systems, offers one promising avenue for redefining Research & Development (R&D) and revolutionizing the LS value chain.

In Belgium, bits and pieces of this information is kept in several databases:

- In hospitals, medical records are increasingly stored electronically in different IT systems;
- Other stakeholders register information, such as longitudinal reimbursed medical resource consumption (by the 'mutualités') or the geographic medicine consumption and prescriptions (by professional associations such as the pharmacists association APB);
- The government partly finances hospitals through the usage of a combined database of diagnoses (MKG database) and medical resource consumption (MFG-database).

This means that in Belgium EHR data is being stored and parts of it might become accessible to Life Sciences companies through cooperation with the mentioned stakeholders, although it is a long term work to collate information from several sources and to have it aligned with privacy laws.

The upside is that longitudinal patient-level data has the potential to transform the full value chain.

In R&D, it could support the identification of disease mechanisms and new discovery areas, accelerate the termination of unsuccessful compounds, decrease patient recruitment cycle times for clinical trials, and improve drug safety surveillance through continuous monitoring. In post-marketing surveillance, large, anonymised longitudinal patient datasets can help identify emerging health problems and populations at high-risk for disease, support outcome studies on the effectiveness of treatment(s) and evaluate the usefulness of diagnostic tests. For more information, you can find [here](#) a report from Deloitte focusing on how EHR data can improve research, development and post-marketing surveillance.

[back to top](#)

---

## Managing talent in a turbulent economy – Leaning into the recovery

Since January 2009, Deloitte together with Forbes Insights have been conducting a year-long longitudinal talent series surveying global executives and talent leaders across all industries worldwide. The survey aimed to find out how executives have been managing their workforces in times of crisis and whether they have developed effective strategies for the economic upturn.

### **Playing offensive**

Last September, -for the first time in 2009 - the number of survey participants who stated to believe that the worst of the economic recession is behind us (31%) outnumbered those who still feared that the worst was still to come (7%). These hints of economic optimism seem to have encouraged them to shift their own priorities. Although cutting and managing cost remains a top priority for the surveyed executives, several other strategic priorities have gained importance. In the Life Sciences and Healthcare industry, for example, 38% of the participants believe that client acquisition and client retention are the leading strategic priorities together with developing new products and services (27%).

In May 2009, Deloitte warned for an approaching “resumé tsunami” during which organizations would lose their high-potential employees to competitors as soon as the recession would end, due to the lack of effective talent strategies. The September study revealed that organizations have finally been starting to adopt talent initiatives to retain their key talent. Executives from the Life Sciences and Healthcare industry have reportedly opted for an aggressive talent offensive as they rank training & development as their top talent priority (45%) rather than a defensive attitude such as headcount reduction (19%). When looking forward to the next quarter, 80% of the surveyed executives no longer rank headcount reduction as their top talent priority. Lay offs are easing. Only 48% of the surveyed executives reported layoffs in the last quarter, down from 61% in May 2009. Executives seem to understand that focusing on cost cutting and headcount reduction only may prove to be a losing strategy leaving their companies without the workforce strength which is needed to benefit from economic recovery.

### **Increased focus on retention**

As a lot of surveyed companies have understood that retention tactics are critical to survive a potential “resumé tsunami”, they have been focusing on opening up more opportunities for career advancements and offering their employees better financial incentives.

Nearly one third of the participants reported that they are increasing career path opportunities. After a year of austerity, even increasing compensation is again under consideration: 28% of the surveyed executives plan to boost their compensation in the year ahead compared to only 15% in January 2009. Nearly 35% of the participants also mentioned flexible work arrangements as an effective retention initiative.

Training and development programs become even more important when it comes to nurturing the careers of key employees. Nearly half of the surveyed executives (49%) plan to increase high-potential employee development programs and 48% of them will start focusing on initiatives to develop their future leaders. They seem to understand that high-potential talent that is not properly developed can be easily poached by competitors.

### **Spotlight on talent and innovation**

The September survey revealed that participating executives clearly understand that their ability to innovate will help determine how successfully their companies navigate today’s difficult economy, but that few companies are implementing talent strategies to drive innovation and, in the end, survive. In the Life Sciences and Healthcare industry only 35% of the participants reported to have a talent plan in place.

Just four in ten surveyed executives believed their companies had identified the key talent

employees and leaders more likely to drive innovation.

In the course of this longitudinal study, Deloitte identified talent and innovation leaders as those companies which have a deep understanding of the link between talent and innovation, and which have already set up sound retention strategies.

[Learn more about the survey findings](#)

[back to top](#)

## Did you know?

**Deloitte was the main sponsor of the Financial Times pharmaceutical and biotechnology conference.** On 17-18 of November, over 200 senior life sciences executives from around the globe attended the 2009 Financial Times annual pharmaceutical and biotechnology conference in London. This marked Deloitte's third year as lead sponsor for this pre-eminent industry event. This year's event focused on the transformation of the pharma and biotech industries for a post-crisis world. Opening remarks were provided by Chris Viehbacher, CEO of Sanofi-Aventis, where he commented on the industry's ongoing transformational change. Other speakers included the CEO/Chairmen of Bayer, Elan, Ipsen, Neuropharma and Proteus Biomedical, the CFOs of Novartis, Dr. Reddy's Laboratories and BTG, and senior representatives in the areas of regulatory, R&D, emerging markets, and collaboration

**Researchers at the Ghent University are at the front row in research on septic shock**, the major cause of death in intensive care units. By **increasing** the release of nitric oxide (NO) gas in mice with septic shock, Anje Cauwels discovered that the animal's organs showed much less damage and their chances of survival increased significantly. This is a revolutionary 180° turn-around to existing theories, since it is generally assumed that NO is rather responsible for the potentially lethal drop in blood pressure in septic shock and hence that a **lower** level of NO would increase survival rate. (*Source: VIB*)

**Scientists mapped the genetic code for two cancers (skin and lung).** Research published in Nature revealed that scientists have identified all mutations in melanoma and lung cancer cells, which has allowed them to produce the first complete cancer genomes. This would pave the way for blood tests to spot tumours far earlier and will yield new drug targets. The International Cancer Genome Consortium (ICGC) is a consortium of 10 countries who are working to catalogue all the genes that go wrong in many types of human cancer. (*Source: BBC news*)

[back to top](#)

## Interested in learning more?

[Please contact us.](#)

---

*If you don't wish to receive the newsletter, please [let us know](#).*

## Security | Legal | Privacy

Berkenlaan 8b  
1831 Diegem

Copyright © 2008 Deloitte Consulting. Member of Deloitte Touche Tohmatsu.

### **About Deloitte**

Deloitte refers to one or more of Deloitte Touche Tohmatsu, a Swiss Verein, and its network of member firms, each of which is a legally separate and independent entity. Please see [www.deloitte.com/about](http://www.deloitte.com/about) for a detailed description of the legal structure of Deloitte Touche Tohmatsu and its member firms.

To unsubscribe, reply to this message and add "Unsubscribe" in the subject line.