

Shaping the Future of Healthcare in Greece

*“Securing healthier future for Europe and Greece through
innovation and investments”*

THURSDAY 27 MARCH 2014, ATHENAEUM
INTERCONTINENTAL ATHENS



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EMEA *and*

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Health consequences of austerity are hard to measure but they are emerging

- A recent article in the “Lancet” found that health consequences have been worse in those countries that implemented austerity measures - citing Greece, Portugal and Spain - compared to Iceland which followed a different path
- Some health consequences of the economic downturn were predictable e.g.:
 - Increase in the number of suicides
 - Reduction in road deaths
- But other observations were more surprising:
 - Increase in the number of HIV and infectious diseases
 - Increase in heart attacks (of 29% in one region of Greece)
- WHO Europe have co-ordinated policy dialogue

Source: *Financial crisis, austerity and health in Europe, Lancet 2013, Vol 381*

Good that policymakers are beginning to take health consequences seriously...attention now needs to be focused on how to ensure budgets are sustainable while maintaining standards of care

*The EU situation: challenges and opportunities

*The Greek situation

*The EU situation: challenges and opportunities

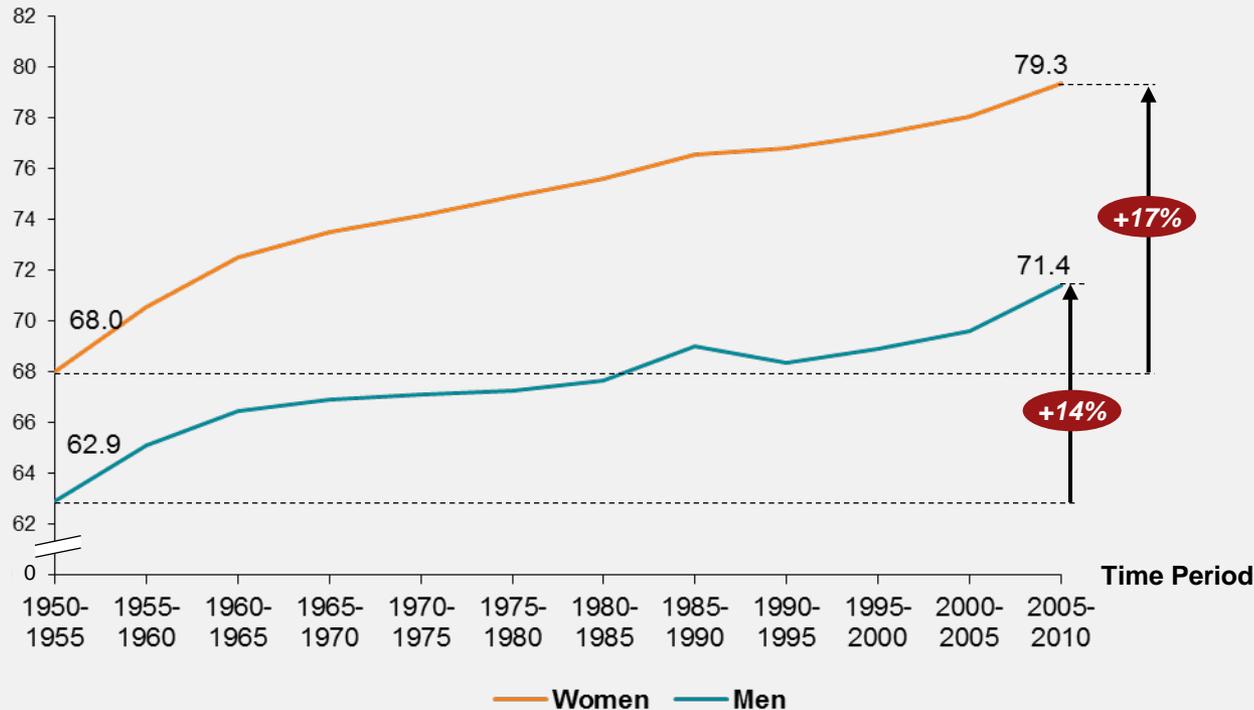


Over the last 60 years Europe has made great strides in improving health outcomes resulting in a 14-17 % increase in life expectancy

Life expectancy at birth for EU27 countries (1950-2010)



Life Expectancy (years)

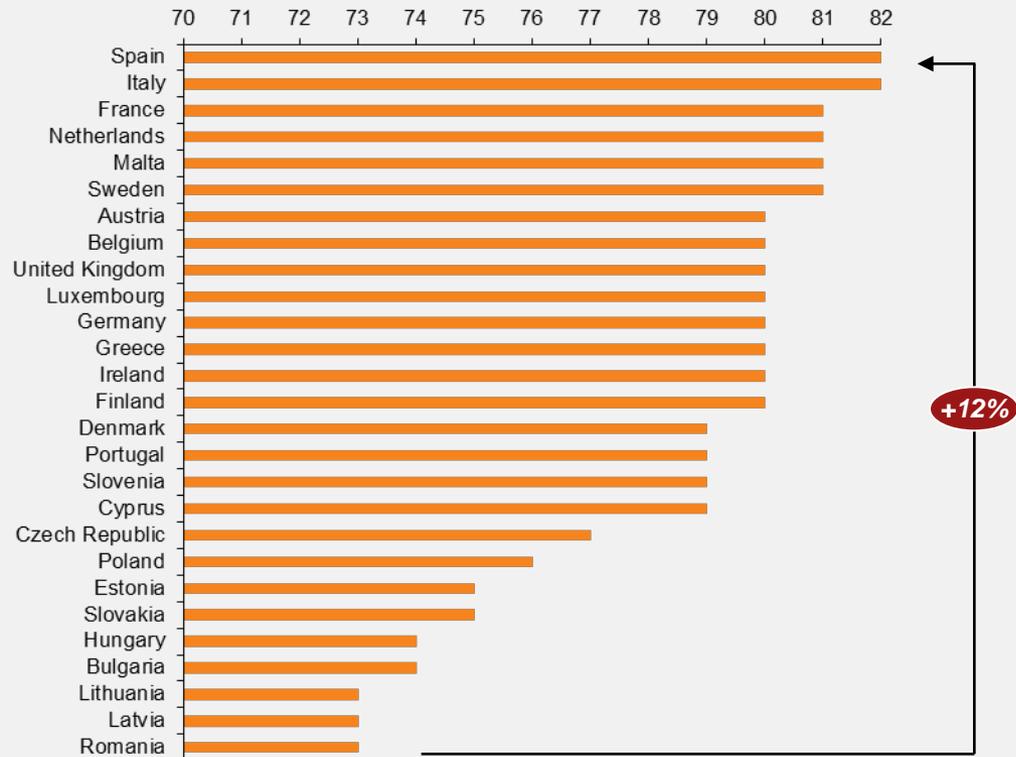


However, wide variations in health attainments remain across Europe, amounting to almost a decade of life expectancy

Life expectancy at birth – 2011

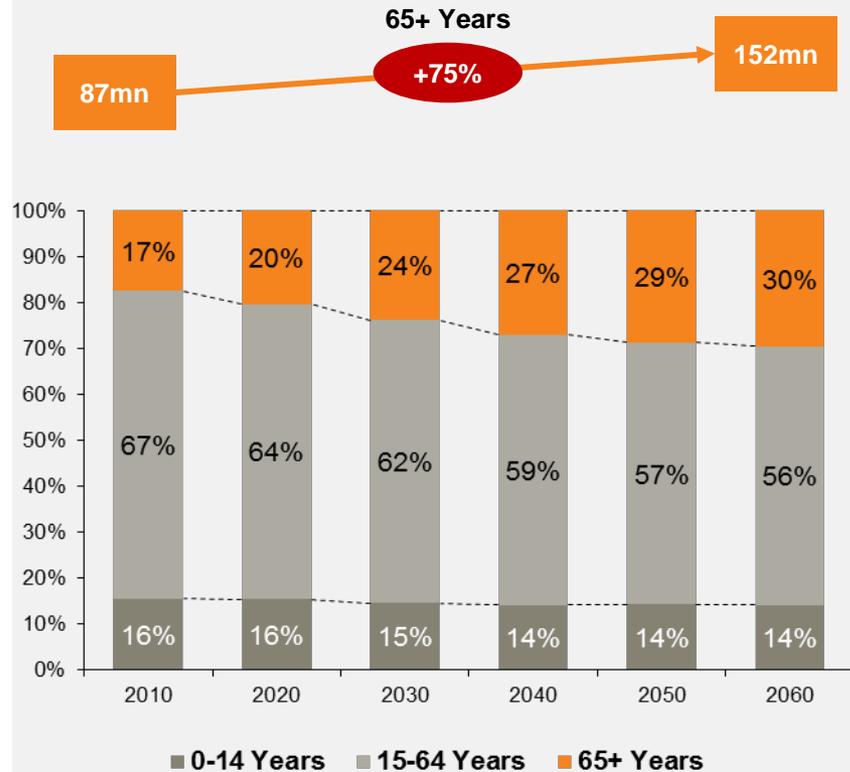


Life Expectancy at birth in 2011 (years)



Looking to the future, Europe needs to find solutions to pressing demographic challenges that will impact health and social spending

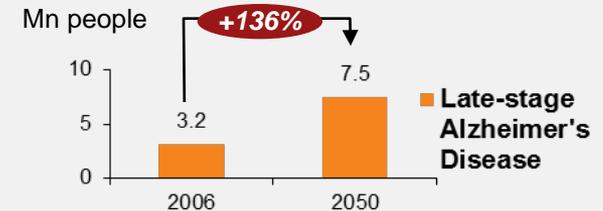
Demographic Development*



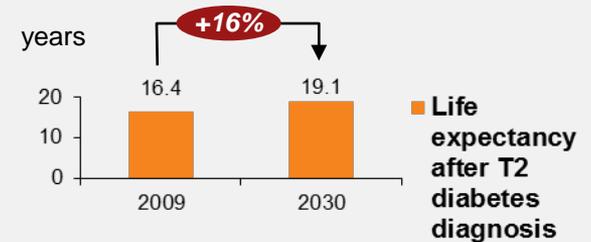
System Impact: Severity, length and increased incidence



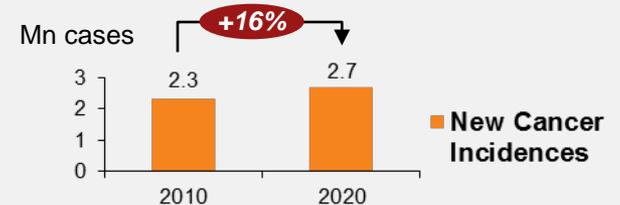
Increase in severity of Degenerative Diseases[†]



Extended impact of Chronic Diseases^Δ



Increased incidence of Cancer[#]



Sustainability of health systems is under threat - How to address those challenges?

DEMOGRAPHY

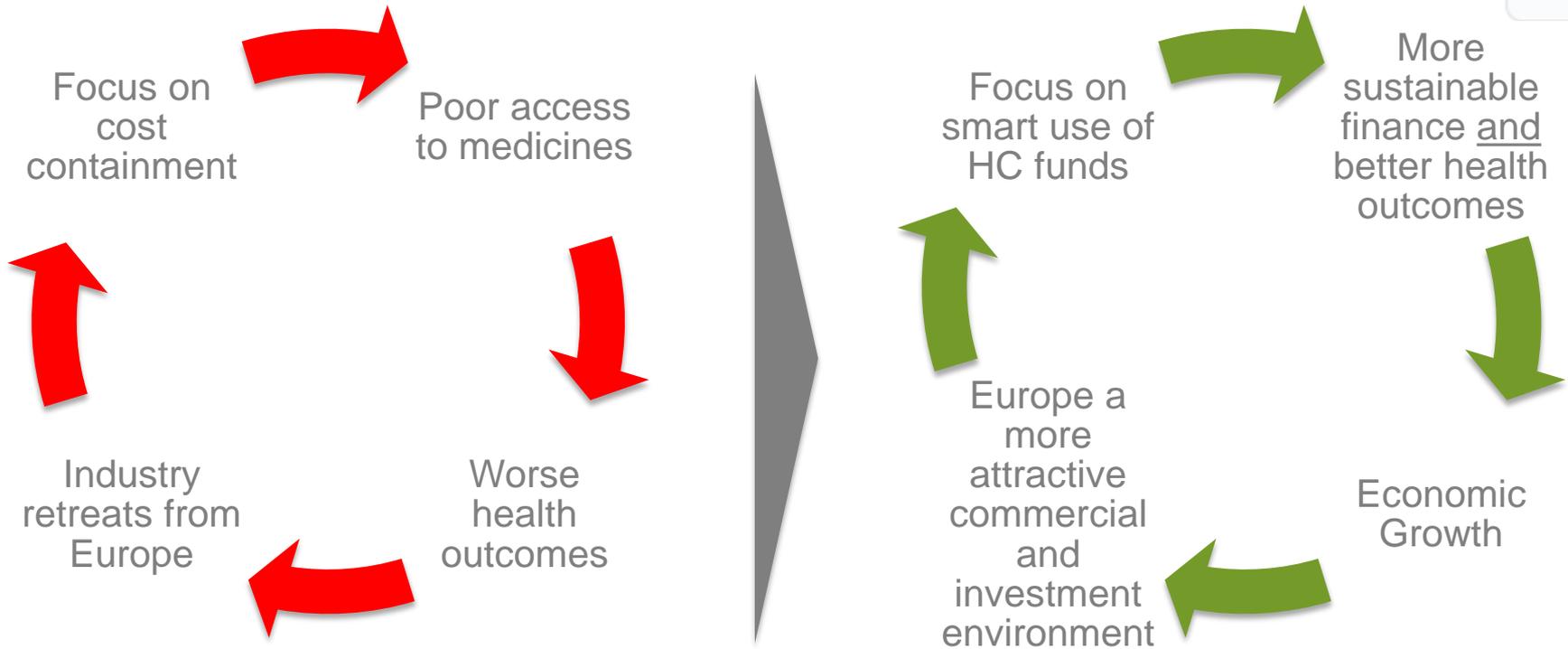


ACCESS

BURDEN OF
CHRONIC DISEASE

AUSTERITY

Our joint challenge – to allow better healthcare to drive growth in Europe



Current vicious circle

Potential virtuous circle

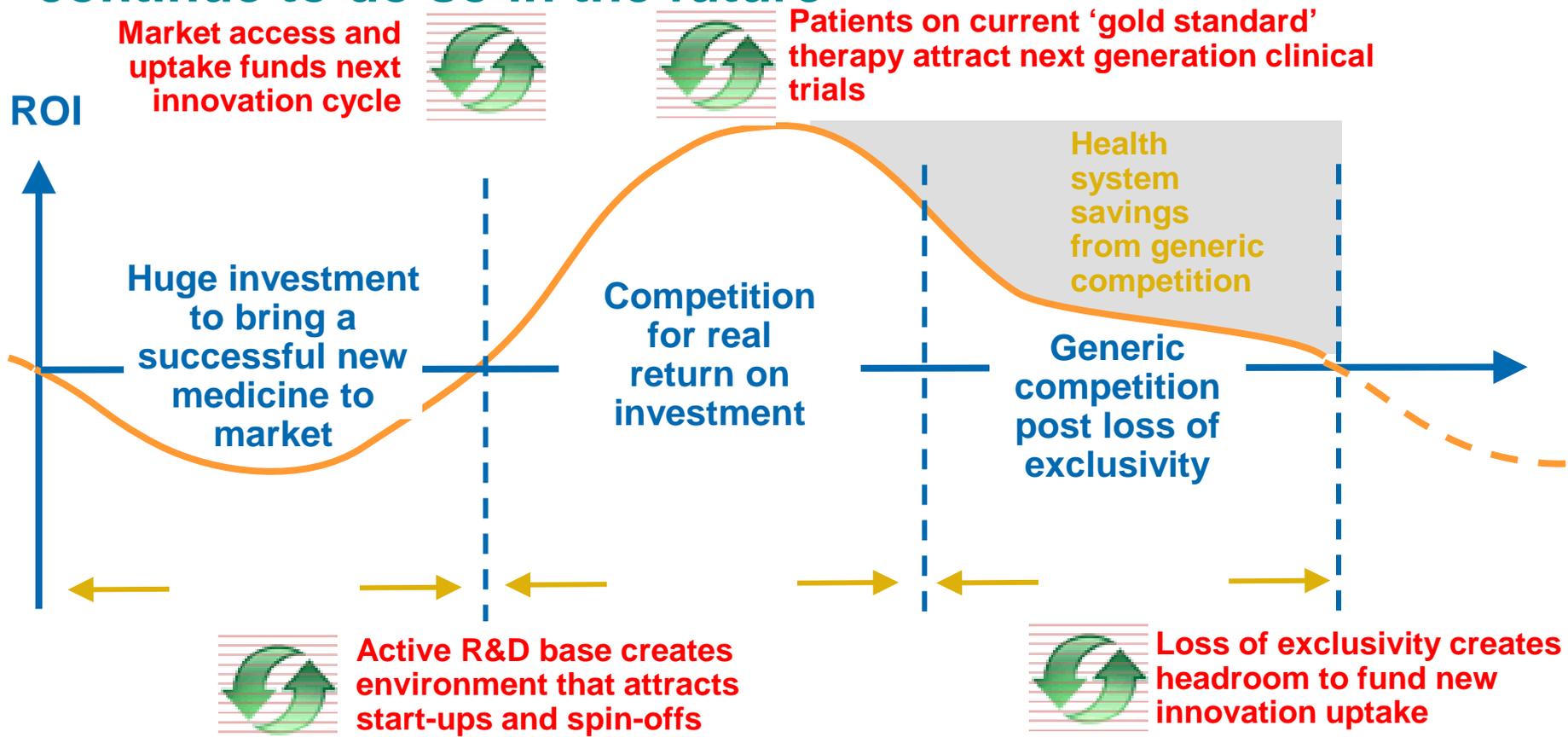
In light of those challenges, innovative medicines have the potential to help to reduce expenditure

Continuing to improve the wellbeing and productivity of Europeans will be even more important in light of the demographic change. Without new effective solutions, health and social expenditure will become unsustainable

The pharmaceutical industry is committed to contribute to address these challenges:

- By **ensuring access and uptake of innovation (1)**, Europe can continue to improve wealth creation in a changing demographic environment
- By delivering **great outcomes**, not just great medicines **(2)**
- Through its **partnership initiatives (3)**

(1) Innovation is key: medicines expenditures tends to follow a sustainable life cycle model and represents one of the best investments a health system can make and will continue to do so in the future



A framework for financially sustainable healthcare innovation

(2) Delivering great outcomes, not just great medicines



Our definition of “outcomes”:

- Improving primary health endpoints in a real world setting (e.g. reduced mortality)
- Improving secondary health endpoints (e.g. reducing comorbidities, enhancing quality of life)
- Improving system cost to achieve endpoints (e.g. reducing cost to treat side effects associated with current treatments)
- Compliance is key

(3) Partnership is key



Policy event in Brussels, 20 March

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For more information: <http://www.janssen-emea.com/>

[Click here to download the Janssen position paper on MDR-TB.](#)



#EVHC

Multi-drug-resistant tuberculosis
how is Europe responding to the new challenge?
20 March 2014, Brussels

Multi-drug-resistant tuberculosis: How is Europe responding to the new challenge?

Thursday 20 March 2014, 1pm
Representation of the state of North Rhine-Westphalia to the EU, Rue Montoyer 47, 1000 Brussels

With:

- **Martin Seychell**, deputy director-general, DG SANCO
- **Fanny Voitzwinkler**, co-ordinator, TB Coalition Europe
- **Dr Adrian Thomas**, vice-president, head of global public health, Janssen
- **Prof. Dr Robert Loddenkemper**, former president, European Respiratory Society
- **Claudiu Tanasescu** MEP
- **Dr Masoud Dara**, team leader, tuberculosis programme, WHO Europe

Partners

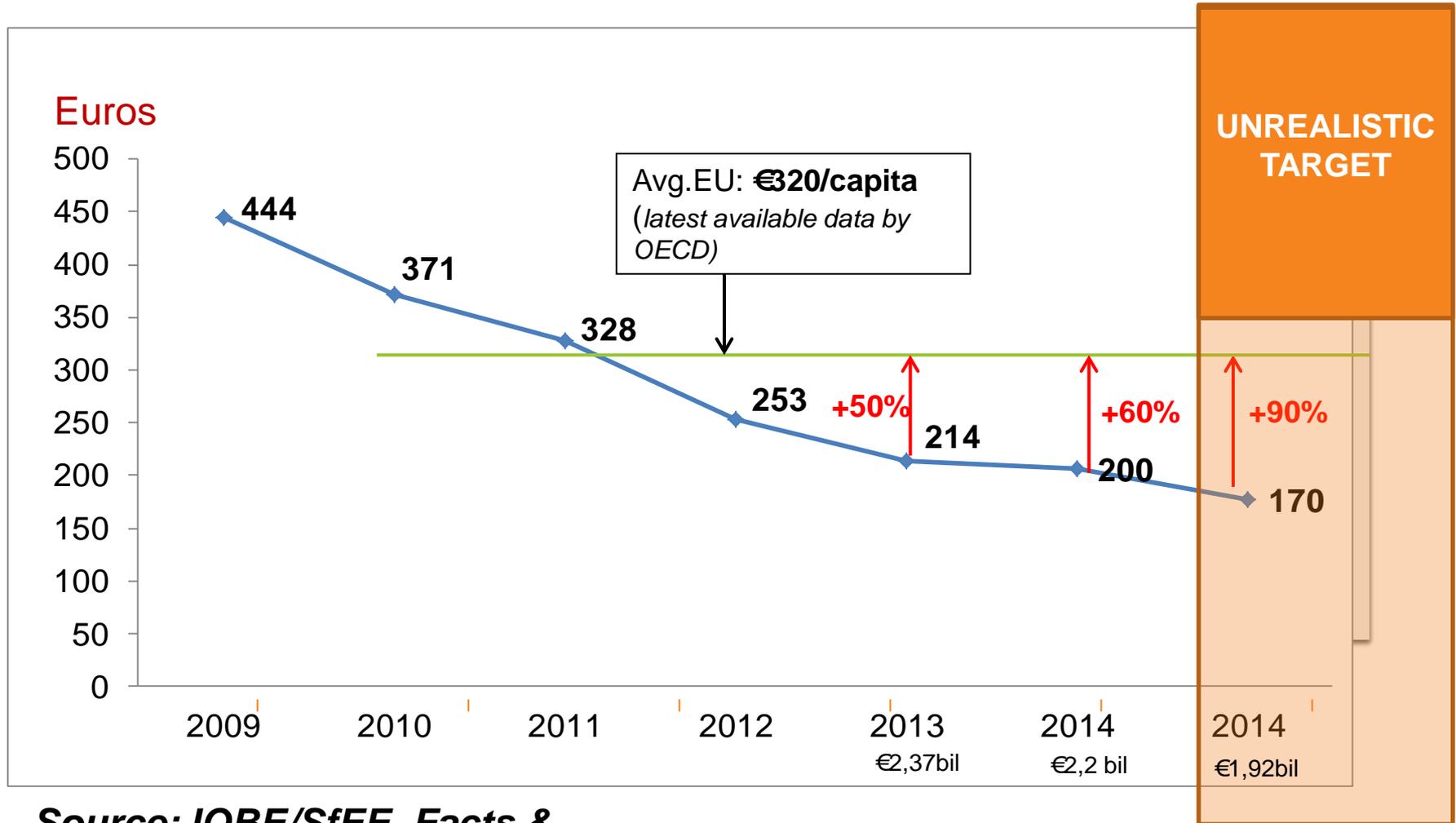


*The Greek situation



GR public outpatient drug spend/capita vs EU

With a target of € 2,2 bn, EU average is still higher by 60% vs Greek numbers



Source: IOBE/SfEE, Facts & Figures 2012

What are the consequences for Greek people's health?

- Significant increase in HIV infections, tuberculosis and other infectious diseases in the last years. Even malaria was re-emerged after 40 years
- Significant cost shifting to patients (from 10% in 2009 to 27% today)
- Barriers to healthcare services for the ever increasing uninsured/unemployed people (~800.000 people)
- Serious effect to areas like mental health services, many deaths by suicide, child health problems

Source: *Kentikelenis, Karanikolos, Reeves, McKee, Stuckler, Greece's health crisis: from Austerity to Denialism, Lancet 2014, 383, 748-753*

What we should specifically consider about Greece?

- Revision of pharmaceutical spending goals for 2014 and onwards, to achieve a sustainable and effective healthcare system
- Recognition of innovation in pricing and reimbursement systems, to ensure patient access to new therapies
- Set the processes to attract more clinical trials and R&D in Greece
- View health expenditure as an investment, not as a cost



We need to move from crisis in Greece to building a more solid foundation for sustainable growth

Greek healthcare needed reform...

- Greece spent more on medicines per head than any other country in the world...
- ...inefficiency of the off-patent/Gx market
- ...access to innovative medicines was lagging

...but now we need to build for the future

- Greece can learn from those countries who have built sustainable high quality health systems
- Partnership with industry and other stakeholders is key to long-term success
- Measures supporting a rational use of medicines, including e-prescribing are to be supported
- Continue reforms that drive genuine efficiency (e.g. off-patent/Gx sector)
- But make sure there is room for innovation

The research-based industry is keen to work with Government and other stakeholders to build a modern sustainable health system in Greece