Thursday, June 6, 2013

8:00 am - 8:45 am	**Breakfast and Registration**
8:45 am - 8:50 am	**Opening Remarks**
8:50 am - 9:20 am	**Andrew Jack**, Pharmaceuticals Correspondent, *Financial Times* **Keynote Interview: FT View from the Top**
9:20 am - 10:30 am	**Ian Read**, Chairman of the Board and Chief Executive Officer, *Pfizer* **Panel Discussion: Transformation Beyond US Healthcare Reform - Competing on Value**

With the re-election of President Obama, the focus of healthcare reform moves from the realm of policy to implementation. While uncertainty remains regarding the impact of appropriation and funding for reform, what is certain is that reform will fundamentally transform the way the life science and broader healthcare industry operates and adds value. The reforms will significantly alter the payer landscape. They will re-energize CER, and will bring into being new cost sharing entities such as Accountable Care Organizations (ACO) with the power to influence the demand for life science products and services. What are the direct and indirect implications of reform for key stakeholders-payers, life science companies, healthcare providers, investors and patients? How are stakeholders adjusting to a world in which value rather than product becomes to new battleground/arbiter of competition?

- What are the implications of the reforms for the R&D and commercial strategies of life science companies?
- How are the reforms impacting payer strategies? Will we see consolidation in the search for scale and negotiating power? To what extent are CER/value considerations already impacting payer contracting strategies, and what is the evidence they are using to underpin their formulary decisions?
- What are the innovative pricing, patient access and alternative payment models for the new era or value and outcomes?

- The new stakeholders: ACOs-threat or an opportunity for life science companies? Can required cost saving be made in an ACO model without restricting access to drugs? What are the models, and what have the outcomes/lessons of the early pilots been?
- What could the affect of appropriation /sequestration be on the industry? What elements of reform may still be vulnerable to the political process? What lies ahead for Medicare-the key to sustainable cost containment?
- How well understood are the new value parameters to the financial community, and how might they affect future industry valuations?

Fred Hassan, Managing Director, Healthcare, *Warburg Pincus*
Paul Hudson, Executive Vice President, North America, *AstraZeneca*
John Noseworthy, MD, President and CEO, *Mayo Clinic*

Moderator:
Terry Hisey, Vice Chairman, US Life Sciences Leader, *Deloitte*

10:30 am - 11:00 am **Networking Break**

11:00 am - 12:00 pm **Panel Discussion: Riding the Next Wave of Emerging Market Growth**

With their large populations, rising income levels and expanding healthcare infrastructures, emerging markets will continue to play a central role in the diversification and growth strategies of life science companies. Yet a number of factors - slowing growth in China, a new wave of protectionism in India, Brazil and Russia, and a growing preference for generics over their more expensive branded counterparts - have recently combined to force a rethink among many life science companies of their approaches to these markets. Faced with these challenges, many are now setting their sights beyond the now maturing BRICs to the a new set of fast-growing countries (Turkey, Indonesia, Vietnam and Argentina among them) where levels of growth and the volume of potential sales are attracting close scrutiny.

- How are the dynamics of the emerging markets changing and what can we expect in the years ahead?
- Which markets beyond BRICs that hold the greatest promise for growth? What are the specifics of these markets, the drivers for growth, and the unmet needs?
- What are the approaches/innovative models for accessing and serving these markets effectively and profitably?
- How is the value story impacting the emerging markets and what impact could it have in the longer term?
- What emphasis should the industry place on these markets as a source of innovation?
- What can we learn from emerging markets that could usefully be applied to life sciences/healthcare practices and strategies in the developed world?

Jeff George, Global Head, *Sandoz* and Executive Committee Member, *Novartis*
Michael Warmuth, Executive Vice President, Established Pharmaceuticals, *Abbott*

Moderator:
Andrew Jack, Pharmaceuticals Correspondent, *Financial Times*

12:00 pm - 1:10 pm **Lunch**

1:10 pm - 2:20 pm **Panel Discussion: Drugs, Devices and Diagnostics - Innovation Through Convergence**

The convergence of drugs, device and diagnostics is leading to innovative healthcare solutions and to new opportunities for business growth and product differentiation in the life science industry. The number of such collaborations is multiplying, and the stage now looks set for steady growth. To realize the value of convergence however, firms will have to move beyond traditional industry boundaries and adjust to operating with companies with substantially different business models, product life cycles, regulatory frameworks, organizational structures, and corporate cultures. What are the business and commercial models for convergence? Is convergence the future of the industry?

- What are the drivers and potential benefits of convergence for drug developers, device manufacturers and diagnostic companies?
- How are regulatory and reimbursement frameworks evolving to keep pace with both combined products drug-diagnostic co-development?
- How can the economics of drug-diagnostic co-development be improved to incentivize further innovation?
- Convergence strategies: what are the challenges in creating convergent solutions (e.g. IP, skills, marketing, manufacturing, organizational structures, allocating risk and rewards) and the critical factors for success?
- What is the likely impact of convergence on industry growth and healthcare costs? Will we see convergence between pharma and diagnostics? Can the independent diagnostic company survive?

Scott Bruder, MD, PhD, Chief Medical and Scientific Officer, *Stryker*

John Capek, PhD, Executive Vice President, Medical Devices, *Abbott*
Jan Groen, PhD, Chief Executive Officer, *MDxHealth*
David Meeker, MD, President and Chief Executive Officer, *Genzyme*

Moderator:

Andrew Jack, Pharmaceuticals Correspondent, *Financial Times*

2:20 pm - 2:40 pm **Keynote Interview**

Colin Hill, CEO and Co-Founder, *GNS Healthcare*

2:40 pm - 3:00 pm **Networking Break**

3:00 pm - 3:20 pm **Consumer Health in Focus**

Amy Schulman, Executive Vice President and General Counsel; Business Unit Lead, Consumer Healthcare, *Pfizer*

3:20 pm - 4:30 pm **Panel Discussion: New Financing and Operating/Business Models for Innovation/R&D**

In their continuing efforts to tackle diminishing R&D returns, pharma companies are taking advantage of a range of innovative R&D financing and partnership models which allow them to increase the number of promising drug programs to which they have access, to share the risk and costs of innovation, and to reduce the development risk of internal programs. In so doing, they are entering into novel forms of partnerships with CROs, biotech companies, and a broader range of financial investors, as well as opening the possibility of innovative cross-industry partnerships.

- From corporate venturing and option funds to capability and service bartering, what are the emerging models? Which models should be applied in which situations and what are the attendant challenges?
- To what extent are these new models improving the returns on external R&D?
- What is the potential for such deals to alter the relative balance between pharma, biotechs and CROs?
- What is the role and what are the prospects for pharma-pharma collaboration to address innovation challenges? What form could such collaboration take (e.g. sharing capacity in manufacturing, salesforce, etc)?
- What are the potential new models for such collaboration (for instance specific disease focused clusters, etc)?

Arthur Higgins, Senior Consultant, *Blackstone Healthcare Partners*
Jan Lundberg, PhD, Executive Vice President, Science and Technology and President, *Lilly Research Laboratories*

Reynold (Pete) Mooney, Global Leader, Life Sciences and Health Care, *Deloitte Touche Tohmatsu*
Tom Pike, Chief Executive Officer, *Quintiles*
Jonathan Sheffield, Chief Executive Officer, *NIHR Clinical Research Network*

Moderator:
Andrew Jack, Pharmaceuticals Correspondent, *Financial Times*

4:30 pm - 4:35 pm

Closing Remarks

Andrew Jack, Pharmaceuticals Correspondent, *Financial Times*