



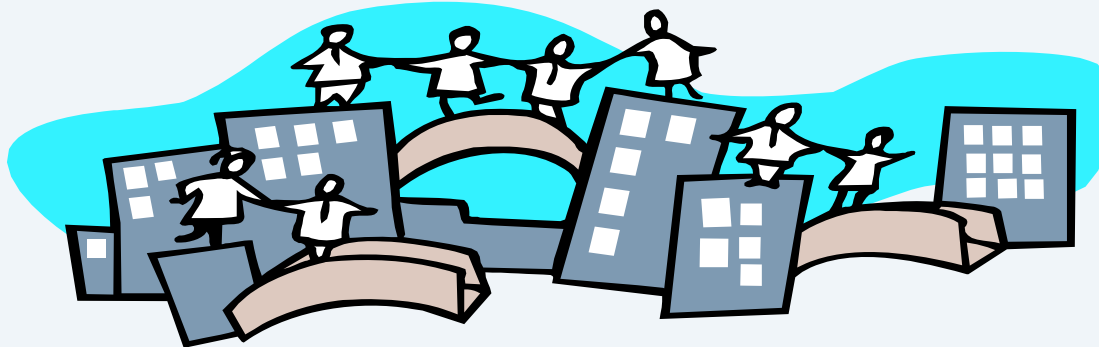
Competing Clinical Research in a Global Environment

Patrick Vallance
Head of Drug Discovery
GlaxoSmithKline

Imperatives for the pharma industry

- Develop medicines that meet unmet medical need
- De-risk development
- Make good decisions earlier
- Reduce time of development

Leads to a desire to work increasingly in partnership with academia and the NHS – a real opportunity for the UK



A disconnect between discovery and invention?

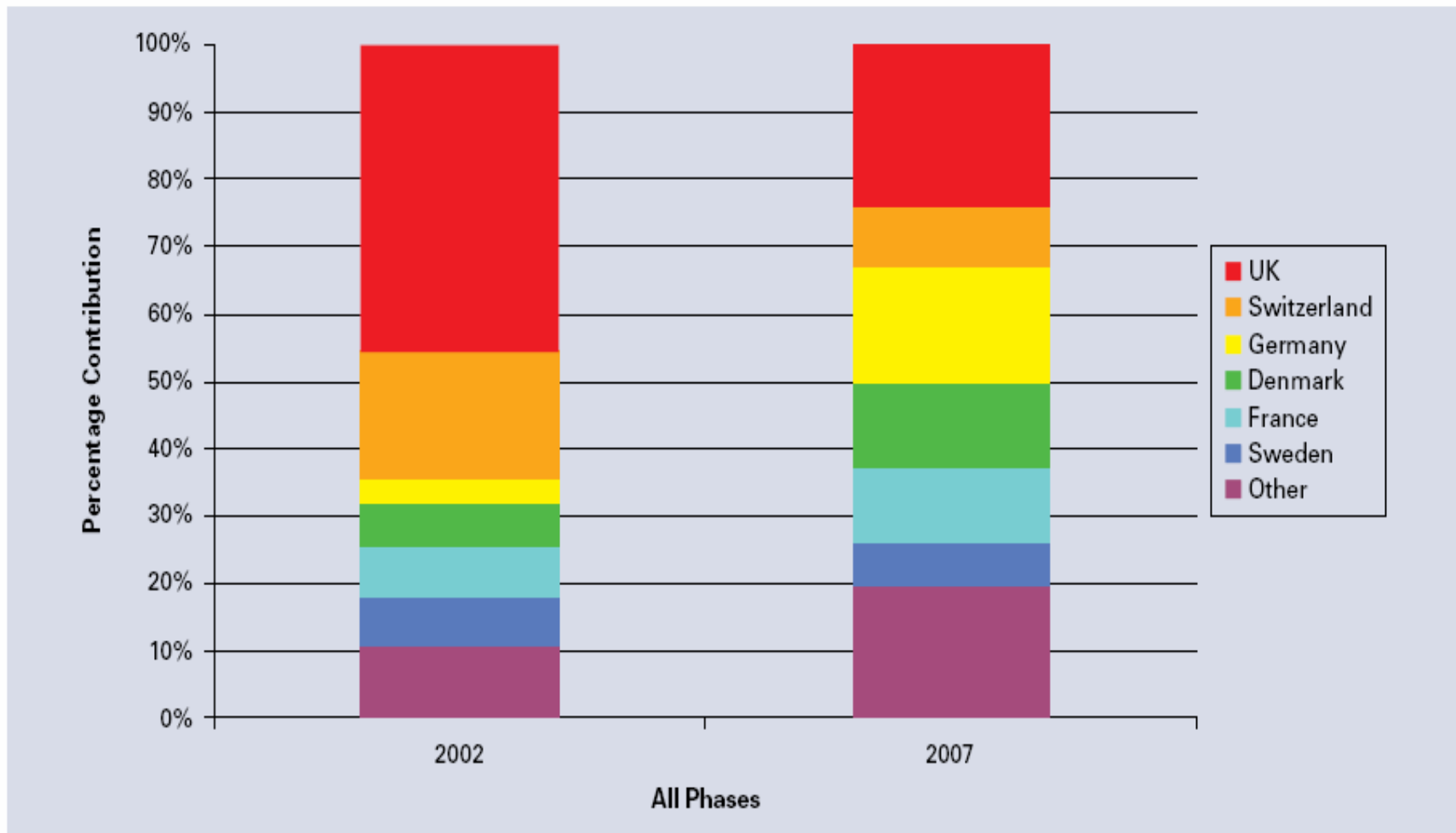


Scientific

New Medicines

- More externalisation
- More partnership
- More experimental medicine
- Move away from blockbuster

Figure 1: European Product Pipelines

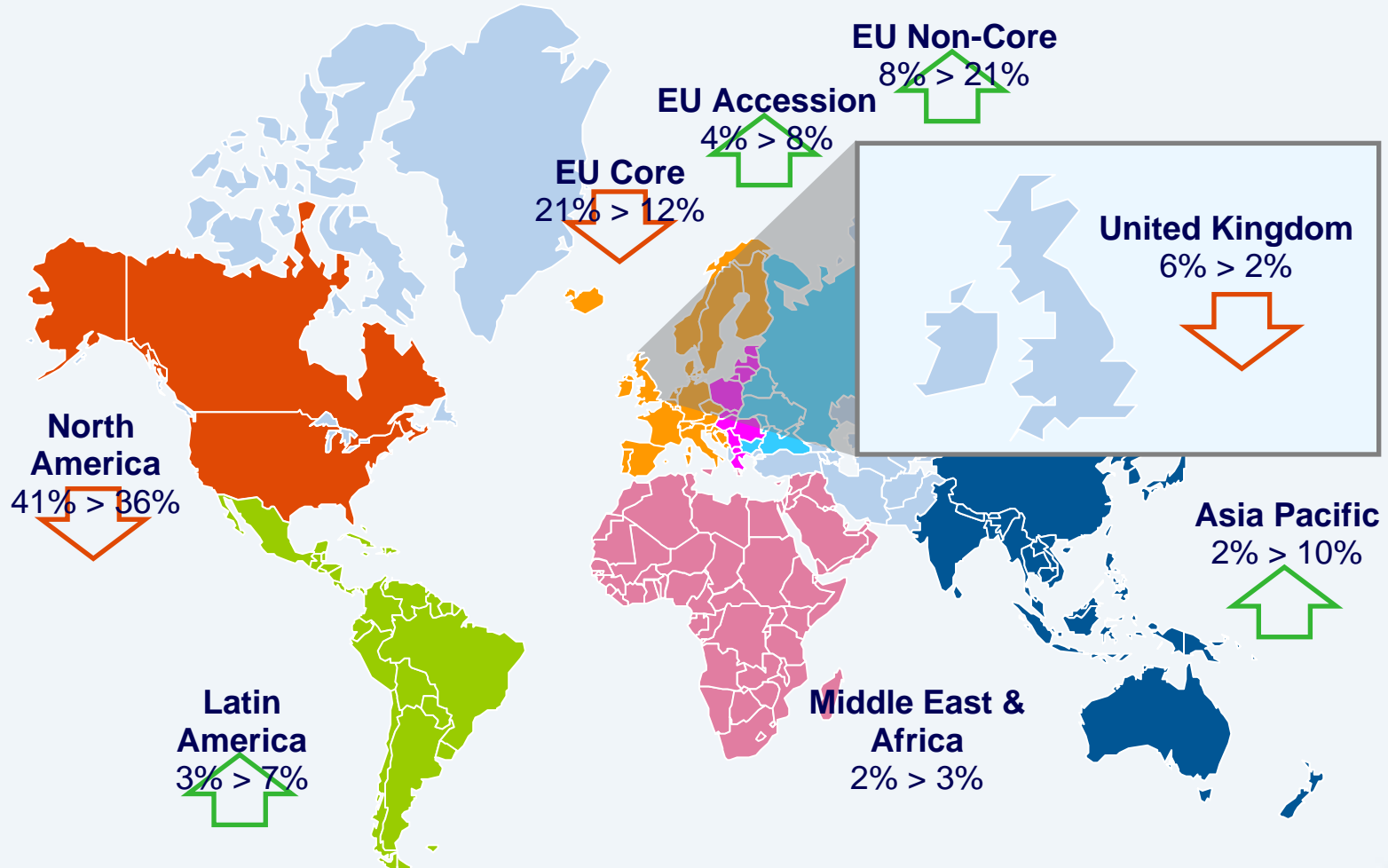


Data: Ernst & Young

Shifting pendulum of clinical research:

Clinical Trial Footprint

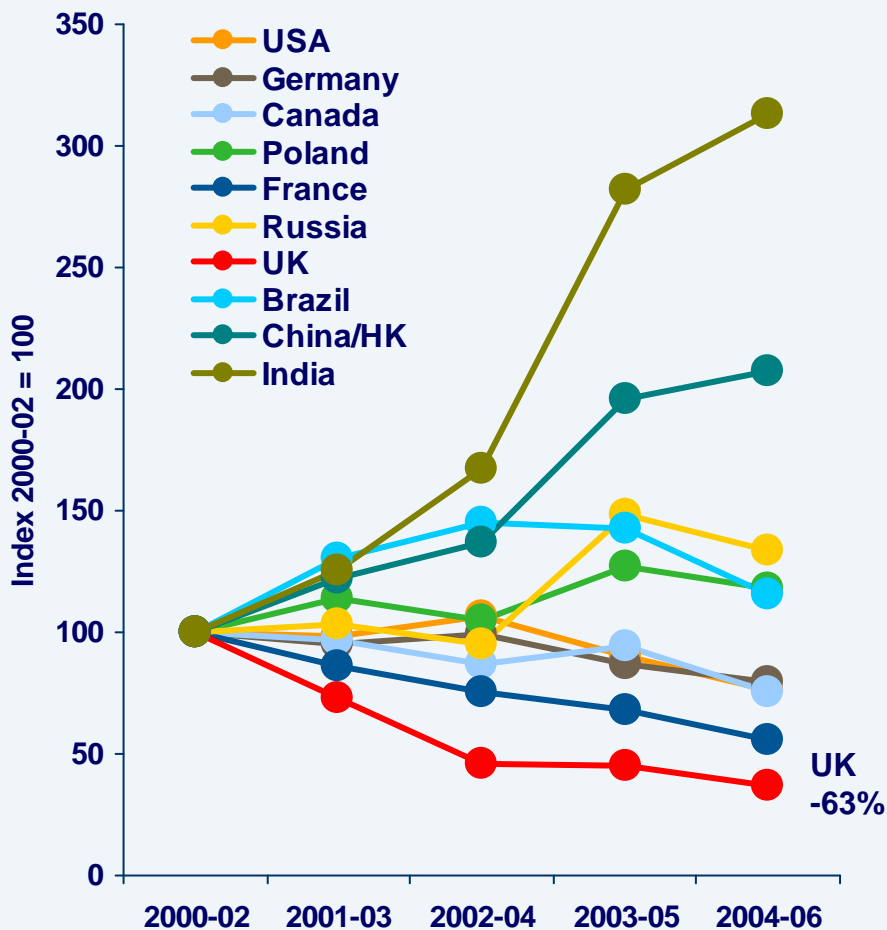
Percentage of Subjects Randomized by Region
for Industry Cohort, 2000 vs. 2007



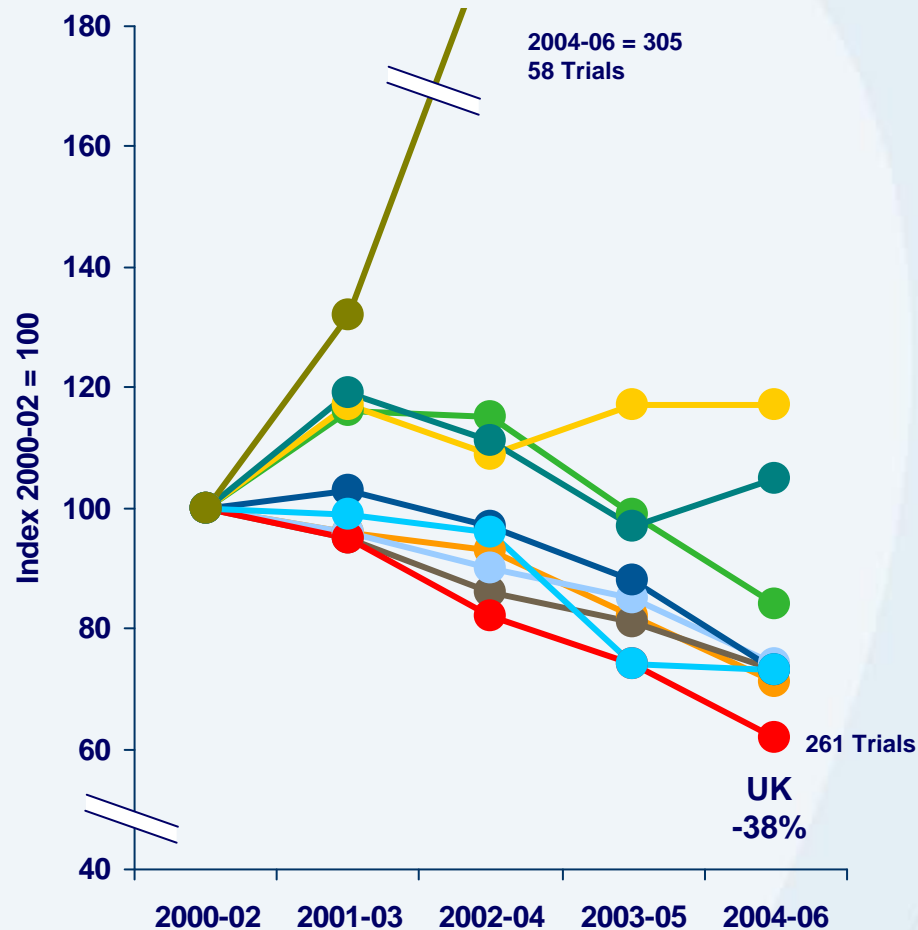
Loosing ground to emerging markets, as well as European/Global peers:

UK Clinical Research

Industry Trends for Patients Completing Enrollment by Country (2000-02 = 100)



Industry Trends for Studies Completing Enrollment by Country (2000-02 = 100)



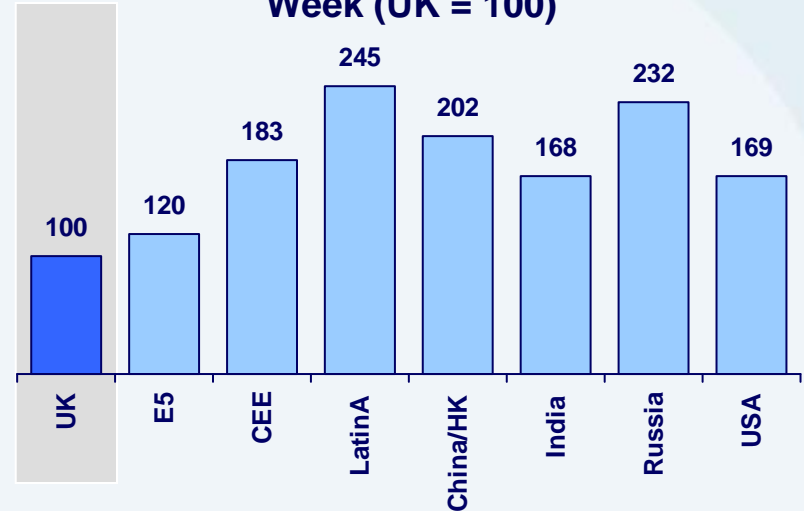
Source : Centre for Medicines Research. © CMR, a Thomson Reuters business. Based on data from a consistent cohort of 20 companies participating each year between 2000 and 2006.

UK clinical trial performance – based on GSK Experience:

Time from Center Initiation to First Subject Visit (UK = 100)



Subjects Randomized per Center per Week (UK = 100)

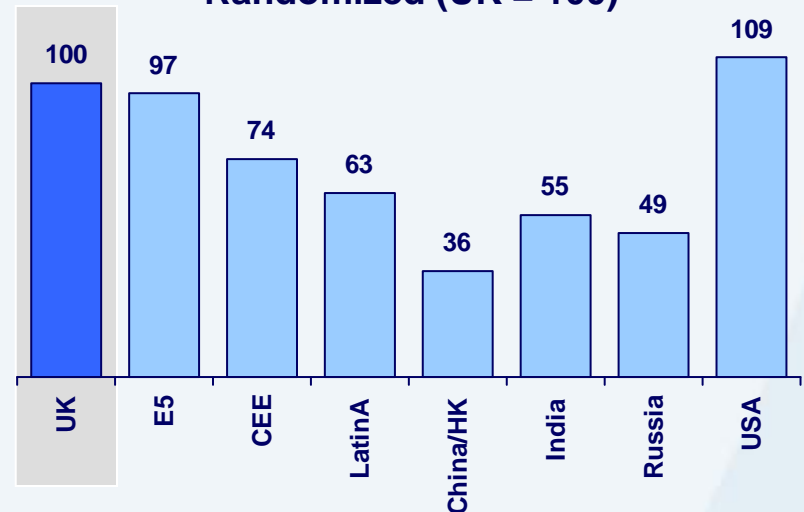


Slower to initiate trial,...

...slower to accrue patients...

... and more sites with 0 or only 1 subject accrued.

Percentage of Sites w/ 0 or 1 Subject Randomized (UK = 100)

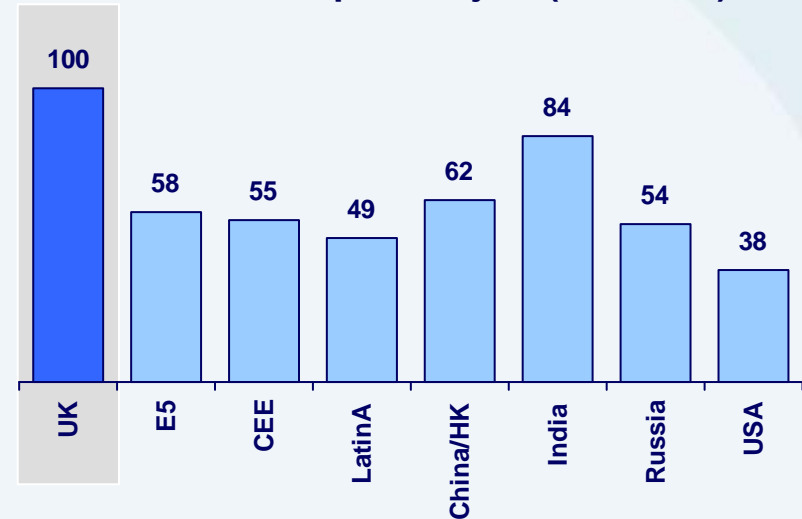


UK clinical trial performance – based on GSK Experience:

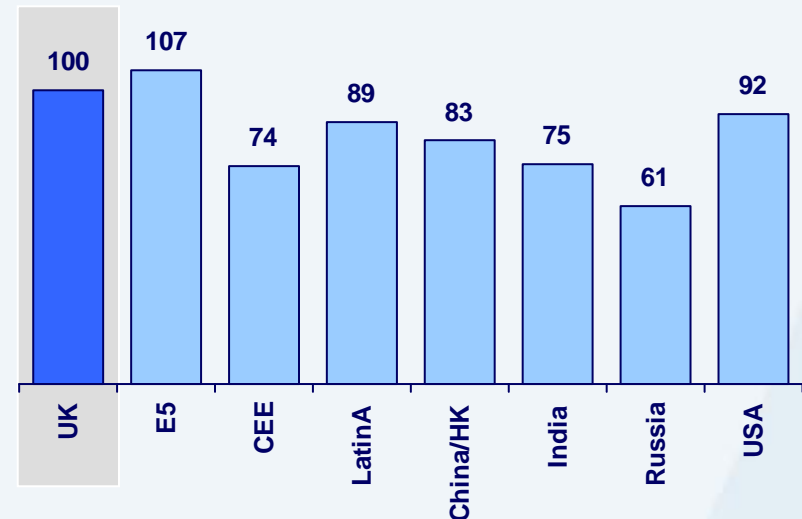
Higher volume of queries per subject...

...taking slightly longer to resolve

CRF Queries per Subject (UK = 100)



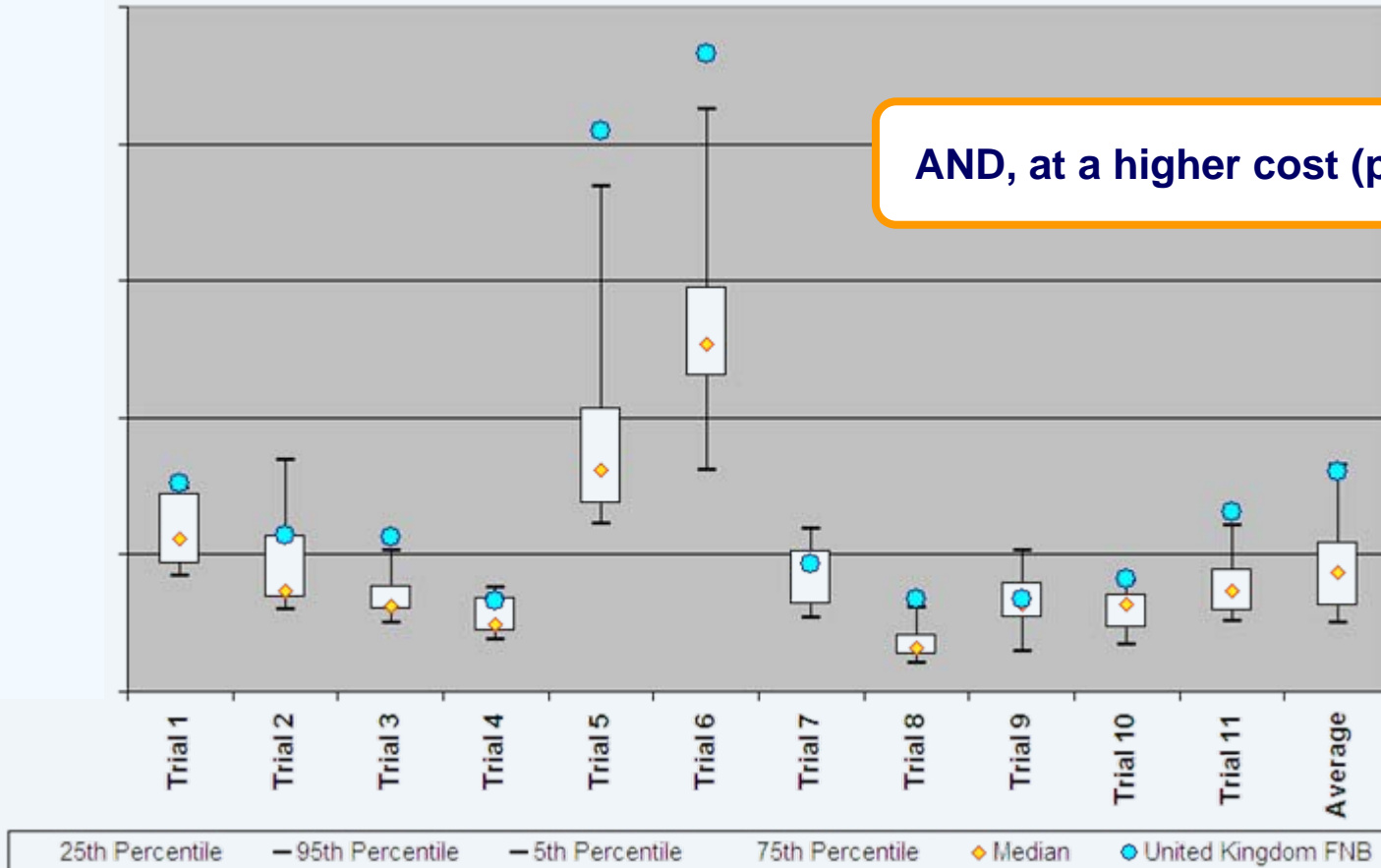
Time to Query Resolution (UK = 100)



UK clinical trial performance – based on GSK Experience:

UK Clinical Research

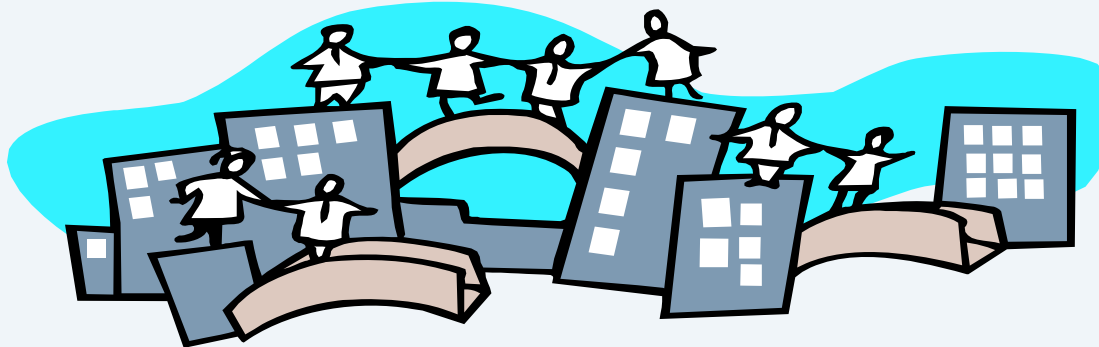
Distribution of Final Negotiated Budget (FNB) per Subject w/ FSFV between Jan-07 and Aug-08

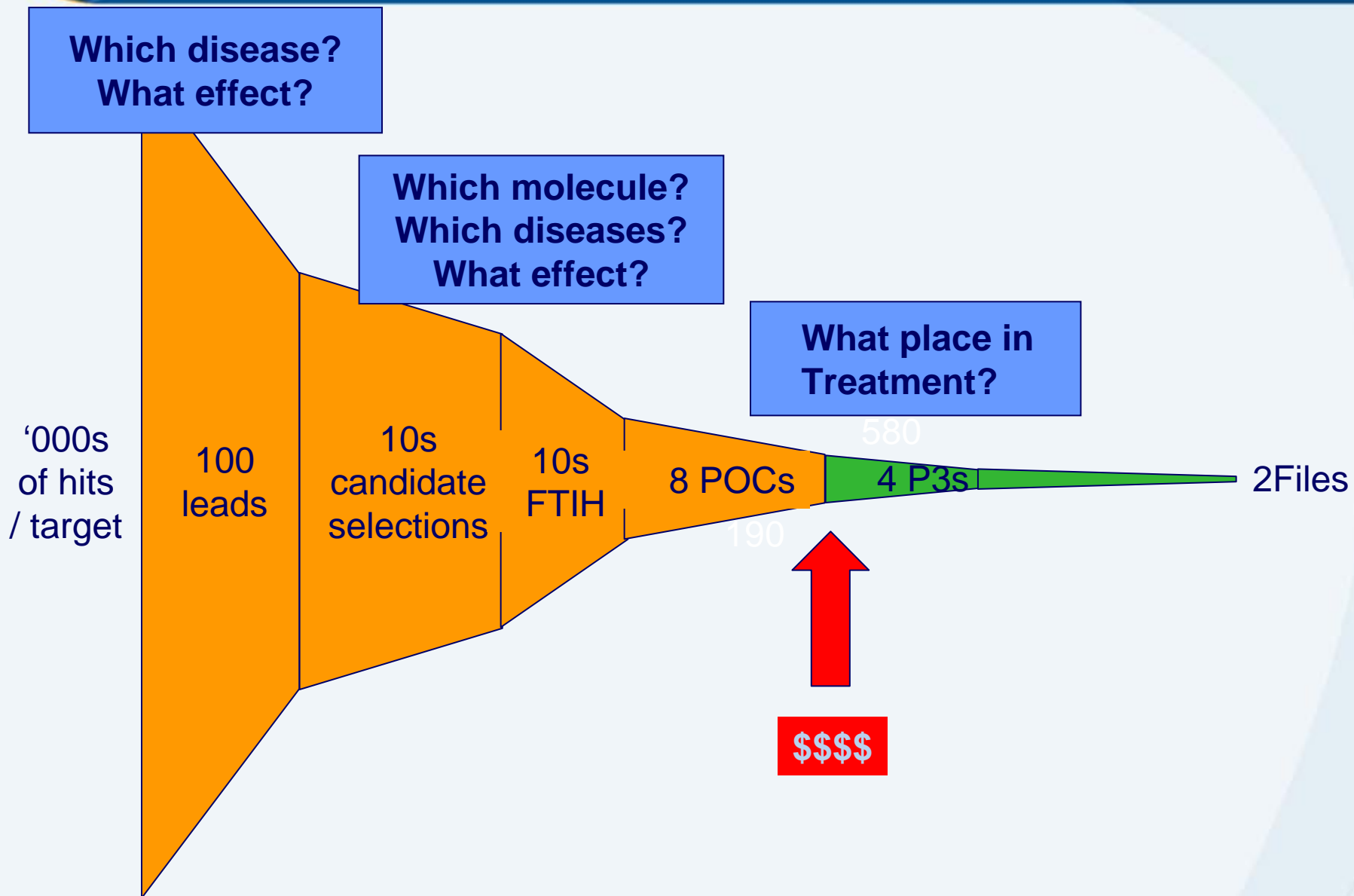


Imperatives for the pharma industry

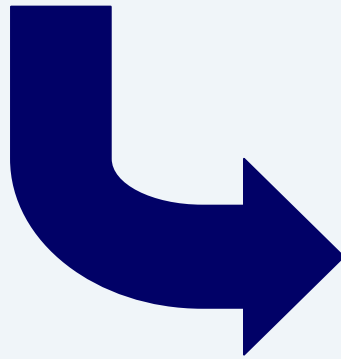
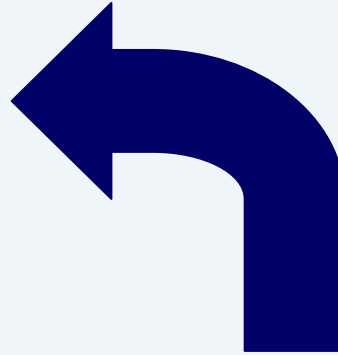
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Bench to Bedside – experimental medicine, stratification of treatments and the need for better early read outs



The UK should play to its strengths

Biomedical Research Centres



Academic Health Science Centres



Global Medical Excellence Cluster



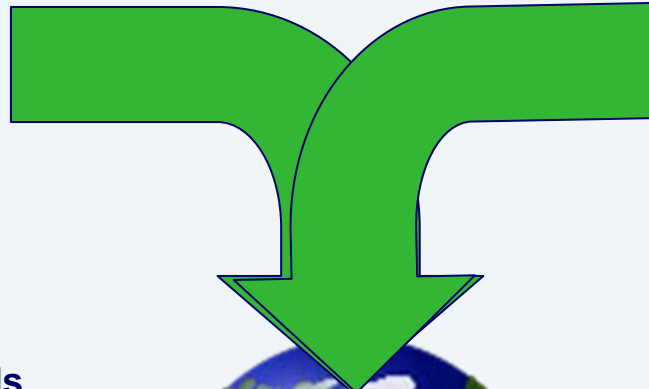
GSK Clinical Imaging Unit, Hammersmith Hospital



Public-Private Partnerships



Academic strategic move towards more public private partnerships



**THE ACADEMIC
DISCOVERY PERFORMANCE UNIT**



GSK strategic shift to greater externalisation and academic involvement

A new model that will not only meet the high-level aspirations of both parties, but will redefine the traditional relationship to deliver on the promise of academic-industrial partnerships