



# „Javno-privatno partnerstvo za poboljšanje onkoloških ishoda u Hrvatskoj“

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Roche d.o.o.

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Prezentacija je pripremljena u znanstvene, edukacijske, ne-promotivne svrhe.

# Roche at a glance

## Maintaining a long-term orientation

 <p><b>1896</b> Founded in Basel Family still holds majority stake</p>		<p>Reliable partner during COVID-19 pandemic</p>		<p>Leader in Diagnostics and Pharma</p>
	<p>CHF 14.1 billion R&amp;D investment in 2022</p>	<p>103,613 Employees worldwide</p>	<p>14.2 million People treated with our medicines</p>	
<p>32 medicines on the WHO List of Essential Medicines</p>		<p>Sustainable one of the most sustainable healthcare company in the Dow Jones Sustainability Indices</p>	<p>29 billion tests conducted with our Diagnostics products</p>	

# The world needs better ways to prevent, diagnose and treat diseases



2/3 of diseases

are either still not treated adequately or not treated at all



70%

of all clinical decision making is influenced by in-vitro diagnostics, despite accounting for only about 2% of total healthcare spending



1/2 the world

lacks access to essential health services



only 4%

of patients are in clinical trials; we are missing valuable insights and data from 96%

# Cancer, a leading cause of death in Europe

- ❑ In 2020, **2.7 million people** in the European Union were diagnosed with cancer and 1.3 million people lost their lives to it.
- ❑ Today, Europe accounts for a tenth of the world's population, but a quarter of the world's cancer cases.
- ❑ By 2035 **cancer cases** are estimated to increase by almost **24%**, making it the leading cause of death in the EU, if no action is being taken as of now.
- ❑ About **40% of cancer cases are preventable**: effective cancer prevention strategies can prevent illness, save lives, and reduce suffering.\*



Europe Beating Cancer Plan; [https://health.ec.europa.eu/system/files/2022-02/eu\\_cancer-plan\\_en\\_0.pdf](https://health.ec.europa.eu/system/files/2022-02/eu_cancer-plan_en_0.pdf) ;

\*A cancer Plan for Europe - official website

# Europe Beating Cancer Plan

In addition to severely affecting the lives of patients and those around them, cancer has a huge impact on our health systems, our economy, and on the society at large. The overall economic impact of cancer in Europe is estimated to exceed **€100 billion annually**.

Europe's Beating Cancer Plan is a main priority in the area of health of the EU Commission and a key pillar of a strong European Health Union. The Cancer Plan is structured around four key action areas:

- ❑ **Prevention**
- ❑ **Early detection**
- ❑ **Diagnosis and treatment** through actions to ensure better integrated and comprehensive cancer care and addressing unequal access to quality care and medicines.
  - ❑ A new 'Cancer Diagnostic and Treatment for All' initiative will be launched by the end of 2021 to help improve access to innovative cancer diagnosis and treatments.
- ❑ **Improve quality of life** of cancer patients and survivors.

# Europe Beating Cancer Plan

"We have set ourselves ambitious goals. We want to detect cancer as early as possible. We want to ensure access to the highest standards of diagnosis and treatment. The overarching matter of concern is to provide to citizens equal access across the European Union to modern technologies of detection and treatment."



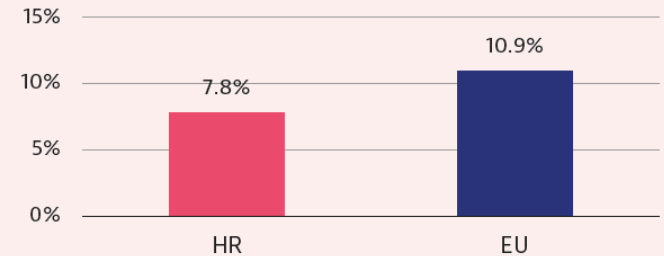
Ursula Von der Leyen  
President of the European Commission  
February, 3<sup>rd</sup> 2021

<https://ne-np.facebook.com/HealthHub.HR/videos/ursula-von-der-leyen-on-cancer-inequalities-in-eu/3157520174538573/>

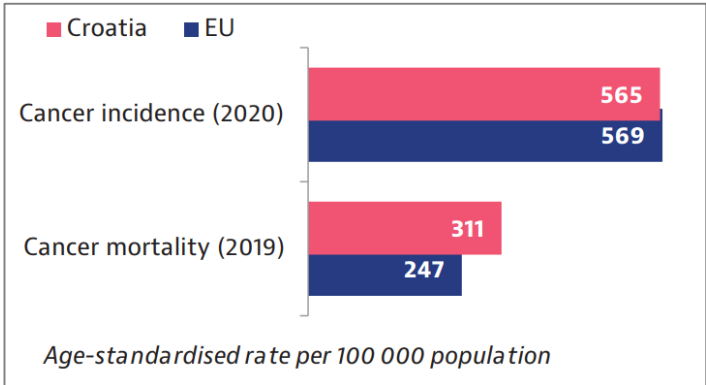
# Croatia has the second highest cancer mortality in the EU

- ❑ Health expenditure as a % of GDP is lower than other EU Member States - 7,8 % (vs 10.9% EU).
- ❑ Estimated cancer incidence in Croatia is close to the EU average, but the country has the second highest mortality from cancer across EU countries.
  - ❑ Lung and colorectal cancer are the two main causes of death by cancer.
- ❑ For those under the age of 65, cancer is the top cause of deaths: 50% among women, and 35% among men.
- ❑ The National Strategic Framework for Cancer 2020-2030 focuses on prevention, coordination and treatment quality.

HEALTH EXPENDITURE AS A % OF GDP (2020)



Source: Eurostat Database.





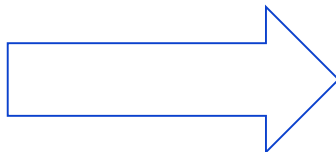
# Croatian National Strategic Framework for Cancer 2020-2030

- ❑ Aim to upgrade comprehensive monitoring, prevention, and treatment of malignant diseases.
- ❑ The document comprises measures for primary, secondary, and tertiary prevention and cost optimisation in providing healthcare to oncology patients.
- ❑ The smart combination of health data and new technologies caters for the exponential development of **personalised medicine**, which becomes a powerful tool to address cancer through tailor-made prevention and treatment strategies so patients receive the therapies that work best for them, and no money is wasted on trial and error treatments.
- ❑ **Public-private partnerships** offer governments and the private sector a unique opportunity to achieve more with less.
- ❑ Risk of not having effective Plan:
  - ❑ People will continue to unnecessarily die from preventable & treatable cancer.
  - ❑ Expenditures will increase, but will not be spent efficiently and outcomes will remain poor.

# An optimized patient path enables a better treatment outcome

Roche focus is changing

- Product XY
- Product ZX
- Product YZ
- Product MN
- Product QX



- Early diagnostics
- Multi Disciplinary Teams (MDT)
- Centers of Excellence
- Involvement of primary health care
- Monitoring by outcomes
- Data collection
- Precision medicine
- Personalized Health Care (PHC)

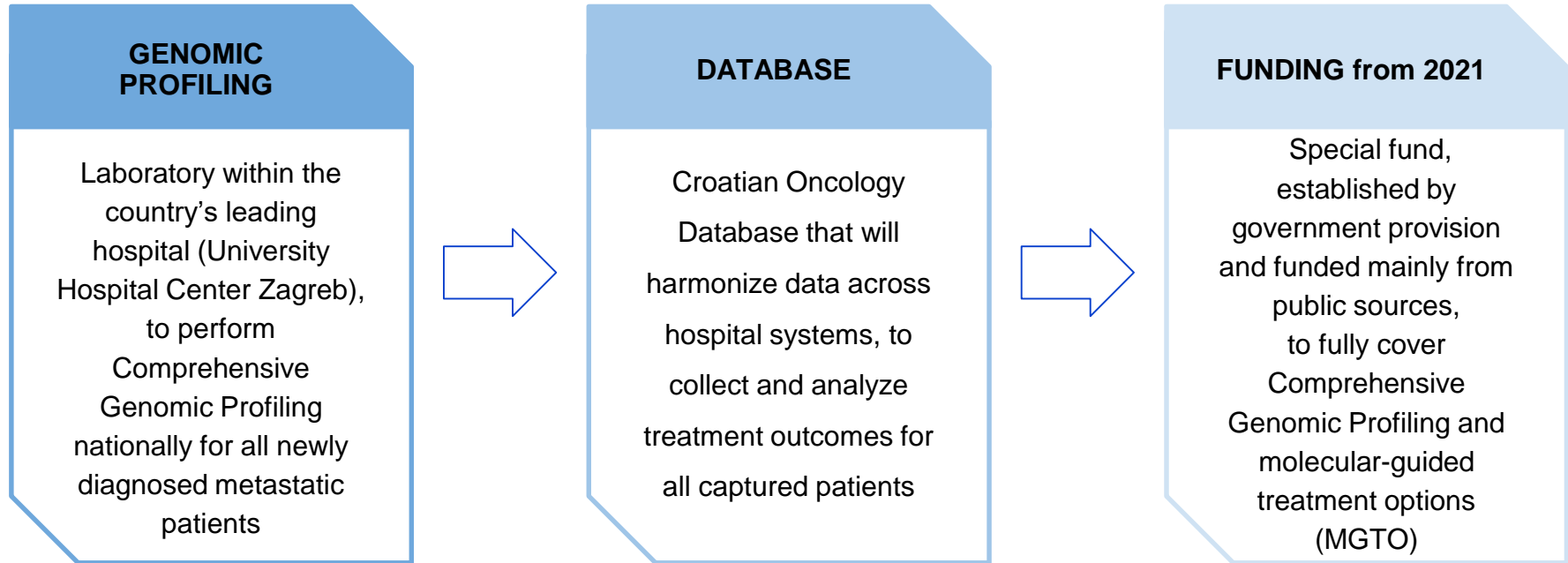
# July 18, 2019 - signing of the Memorandum on Cooperation with the Government of the Republic of Croatia

Project of Personalized Medicine in Oncology with the Aim of improving the Outcomes

- ❑ The only such project at the national level in the world
- ❑ Roche is investing more than 12 million CHF in the project



# Project of Personalized Medicine in Oncology with the Aim of improving the Outcomes

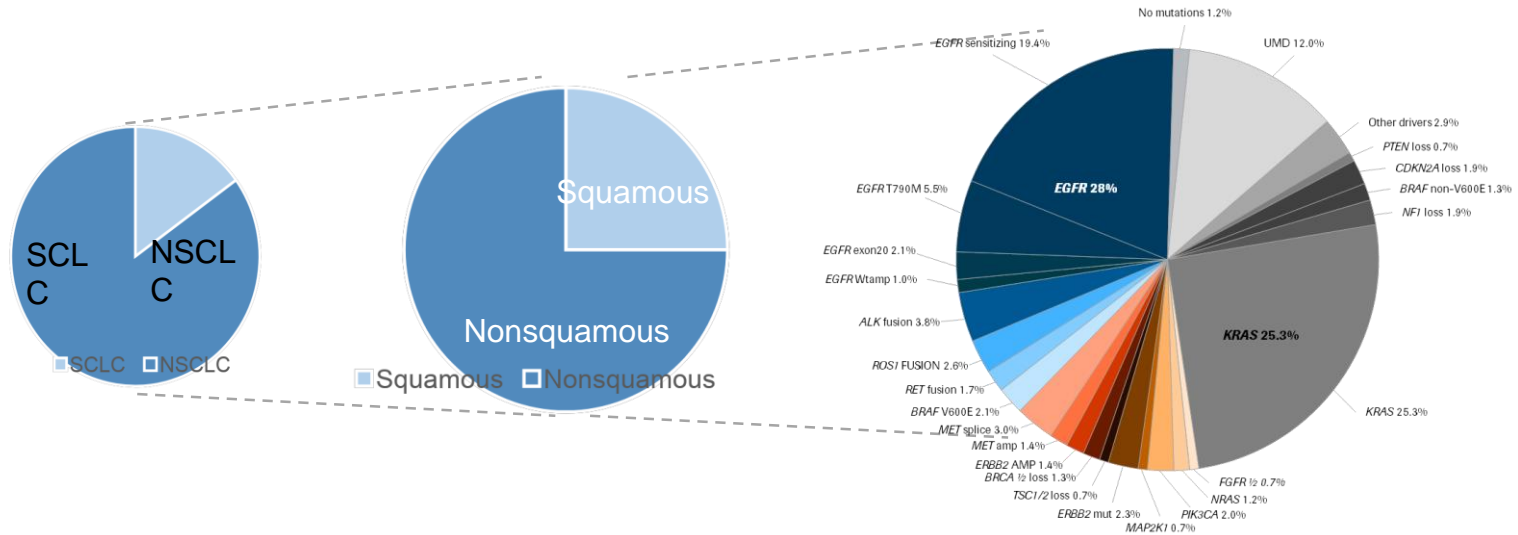


MGTO=molecular-guided treatment options

# Rapid pace of change in understanding cancer

Improvements in molecular analysis tools have allowed us to reveal more of the inherent complexity in cancer

Traditionally, cancer classifications were based heavily on tumour type and histology<sup>1</sup>



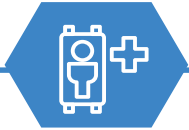
Recently, the focus is shifting towards specific genomic alterations or biomarkers<sup>2</sup>

Spectrum of oncogenic drivers associated to 860 patients with lung adenocarcinoma identified by MSK-Impact.

SCLC: small cell lung cancer, NSCLC: non-small cell lung cancer; UMD: no actionable mutation.

1. Bode, A. M., and Dong, Z., (2018) *npj Precision Onc* 2:1; 2. Jordan EJ *et al.* (2017) *Cancer Discov.* 2017; 7: 596-609.

# Comprehensive Genomic Profiling can deliver benefits to everyone



## Patients

- Logical rationale for treatment
- More treatment options
- Enhanced drug effectiveness
- Less use of more toxic chemo-therapies



## Doctors

- Increased chance to find biomarkers for on-label therapy
- Increased treatment options when SOC exhausted
- Rational choice based on tumor biology
- Decision support



## Regulators

- Increased quality of testing
- Expansion of labels with larger datasets
- Greater scrutiny for in-market use of therapies



## Payers

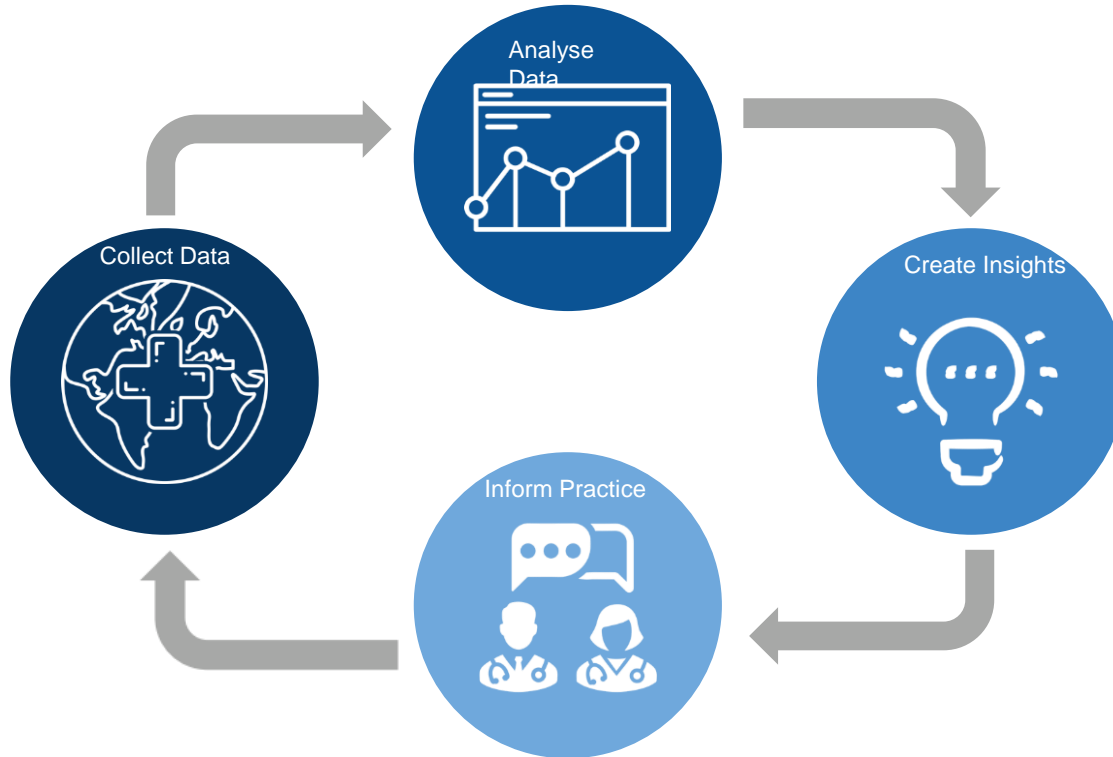
- More rational care
- Fewer wasted interventions
- Meet societal goal of fewer cancer deaths

# A project of personalized medicine in oncology with the aim of improving treatment outcomes

## What we have done so far?

- ✓ The first phase of the development of the COD, Croatian oncology database, and new onco-module in HIS (pilot at KBC Zagreb) have been completed and are awaiting implementation. Expansion to other institutions is expected in the second half of 2023.
- ✓ Renewed fund at HZZO for CGP and MGTO, for year 2023. amount is approximately €10 million.
- ✓ The National Commission for Molecular Guided Treatment Options meets regularly, discuss cases and makes recommendations.
- ✓ An investment contract was signed between the government of the Republic of Croatia and Roche for the purpose of remodeling and equipping the laboratory of the future Institute for Personalized Medicine.
- ✓ Based on the experiences of the past year, the Ministry of Health's guidelines related to the implementation of CGP and MGTO were recently revised.

# Vision - Learning Health System





# European Health Data Space: Why does this matter?

As much as 30% of the world's stored data are currently produced by health systems. But the health sector lags behind in exploiting this potential. It is a sector which is 'data rich but information poor'



Brussels, 19.2.2020  
COM(2020) 66 final

**COMMUNICATION FROM THE  
COMMISSION TO THE EUROPEAN  
PARLIAMENT, THE COUNCIL THE  
EUROPEAN ECONOMIC AND  
SOCIAL COMMITTEE AND THE  
COMMITTEE OF THE REGIONS**

**A European strategy for data**

## GROWTH POTENTIAL OF THE HEALTH DATA ECONOMY



5.5 billion €

In savings for the EU over ten years from better access and exchange of health data in healthcare



20-30%

Additional growth of the digital health market



5.4 billion €

In savings for the EU over ten years from better use of health data for research, innovation and policy making

**Doing now what patients need next**