Interview: Janice Murray – President, Novartis Canada

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Janice Murray, president of Novartis Pharmaceuticals Canada Inc., highlights the track record of excellence Novartis has enjoyed in Canada as the second largest pharma affiliate in the country, the challenge of adapting to an increasingly uncertain market access environment, and the exciting initiatives through which Novartis is delivering innovations and value to patients and healthcare stakeholders in Canada

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Janice, you were appointed president in May 2017, but you are no stranger to the Novartis organization in Canada. What have been your priorities over the past few months?

As president, my mandate is really to advance Novartis' mission in Canada: to bring new medications and innovations to Canadian patients. It is about continuing the journey that Novartis Canada has been on for many years.

On a personal note, having worked in the affiliate previously in various capacities, I knew the organization fairly well, but had not engaged as deeply on the policy aspect before this role. From the policy perspective, access continues to be the main challenge. The Canadian market access environment has been described as fragmented, involving Federal, provincial and territorial entities; public and private payers; as well as multiple layers of approval. Part of my focus has therefore been to immerse myself on the policy side of the business and in particular, to work with Innovative Medicines Canada (IMC), the industry pharma association, to understand how the

pharma industry can have a seat at the table and be considered a true stakeholder within the Canadian healthcare ecosystem – because we have solutions to offer and we are keen to be part of the ongoing dialogue in this country.

My view of the business has changed as well. Managing a business franchise previously, I was really in the ‘now’ and the present moment, while managing an affiliate currently means I need to look towards the longer term. Even as a product launch is occurring, I have to think about the next launch, how to resource future launches, and how the environment might change in the next months and years!

As the second-largest pharma company in the world, what role can Novartis play in terms of advocating for better access to medicines and better patient outcomes?

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The access environment in Canada is in a state of flux at the moment, and in particular, there is increasing uncertainty regarding the clarity and timeliness of the regulatory processes. Timelines seem to be stretching longer, access seems slower, and there are more layers of approval required. As it currently stands, we seem to be in a spectator position as there is no defined feedback process for industry. This is why we have sat down with our peers through IMC to work out how as an industry, we can offer better solutions.

Every day, we see how difficult it is for patients to access new medications. Aside from the policy level, we are also working with individual clinics and hospitals, whether in terms of helping healthcare practitioners better understand the patient journey, identifying areas of costly fragmentation, or simply how to optimize the way patients are treated.

As a global pharma company, we work within a multitude of different healthcare systems around the world, which means we are exposed to what works and what does not. We recognize that new medications are often seen as a concern for government and payers from a fiscal sustainability standpoint, and the challenge of creating a sustainable healthcare environment is difficult. Even as we continue to bring in new and innovative medications for patients, we do want to offer solutions on the budget sustainability aspects. For Novartis as a diversified pharma company, our generics arm, Sandoz, plays a significant role here.

Novartis is also interested in fostering pay-for-performance-type environments. This is still a new area, especially in Canada, and it may be complicated for governments to adapt to these new systems. As a matter of principle, we are proponents of becoming accountable for the outcomes of

our medications.

Aside from the market access piece, innovation is also a hot topic in Canada. Despite its world-class science and R&D, as well as excellent track record in medical innovations, Canada has not quite managed to position itself as a leading life sciences hub in the likes of the US, Switzerland or Singapore. What are the challenges here?

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There is certainly a Federal desire to reach that goal. Canada has all the building blocks: great institutions, academics, researchers, and a robust healthcare system. Yet Canada has never developed its own pharma company to anchor the ecosystem. We recently participated on a panel discussing precisely this issue, and access to capital is a significant stumbling block. When you consider the sheer cost associated with bringing a drug from development to patient access as well as the timelines, very few companies can sustain the revenue stream needed.

At the same time, Canada does already have a strong innovative pharma footprint. But market access issues come into play here as well, because if countries want to be at the forefront of innovation, they also need to be able to provide market access within a reasonable time frame. In Canada, the average length of time from submitting a dossier to Health Canada to first listing in a single province is close to 2.5 years. When it comes to life-changing and life-saving drugs, that is a very long wait.

The pharma sector is highly innovative and should be seen as a valuable partner within Canada's innovation agenda. But there needs to be a process through which we can participate. It is not just about a company investing some money in innovation initiatives. That said, Novartis does participate in initiatives like the Québec Consortium for Drug Discovery (CDQM) in Québec, a great example of valuable public-private partnership.

Novartis is one of the largest R&D engines in the country. The Federal government recently announced a proposed CAD 950 million 'superclusters' initiative and we would be very keen to participate but, at the same time, we still need to contend with all the uncertainty and lack of visibility surrounding the market access piece I just highlighted.

Coming back to Novartis Canada, despite the uncertainty and challenges, Novartis is still the second-largest pharma company in Canada. What have been the pillars of success?

Novartis is rather different from many other pharma companies in that we have an extremely broad portfolio, working in areas like oncology, cardiovascular, neuroscience, respiratory, ophthalmology and immunology, to name just a few. We also have a highly innovative pipeline with over 200 products in development globally. In Canada alone, we have launched 11 new medications in the past five years and we are currently conducting over 100 clinical trials. Certainly, the emphasis we place on research across the various therapeutic areas in which we work is a huge part of our success.

In terms of what has been driving growth, oncology has naturally been a significant contributor, where we have products for chronic myeloid leukemia (CML), breast cancer and melanoma.

On the pharma side, heart failure has been an area of focus. For Canadians, cancer and heart disease are the two leading causes of hospitalization and death, and in particular, heart failure is the second most common reason for hospitalization in people over the age of 65. We introduced a new heart failure medication two years ago that, according to clinical trial results, reduced hospitalization by 22 percent and mortality by 20 percent. This is significant not only for the patients that have benefited from this but also for the wider health care system in terms of lower hospitalization costs.

Novartis' mantra is to either be first- or best-in-class. We are not going to introduce a 'me, too' drug. We want to always be bringing something that truly changes the practice of medicine.

Given the strength of Novartis' pipeline, what upcoming products are you most excited about?

We also recently introduced a medication in the areas of immunology and dermatology for three indications: moderate to severe plaque psoriasis, active psoriatic arthritis and active ankylosing spondylitis.

We also have in development a new migraine medication, which will be the first innovation in this area in about ten years. Migraine is a heavily impactful disease affecting approximately 10 percent of the population – and women three times as much as men – and it really affects quality of life as well as work productivity, so our medication, which tackles the disease in a completely different way, will really benefit patients.

We continue to have great medications in ophthalmology, including a product for wet age-related macular degradation (AMD), which is the leading cause of blindness in people over the age of 65. Novartis has contributed to the prevention of a significant amount of vision loss across the country,

which we are very proud of.

The challenge for us – a positive one – is to keep up with the number of products we are launching! We always have many files undergoing the approval process. Not only do we have to keep track of all the timelines within an extremely complex system, we also sometimes have to prioritize and allocate resources based on our main objectives.. Thinking about where we can add the most value to patients and drive the most change helps us to anchor our priorities as a company.

How can companies like Novartis also drive value beyond providing innovative medications?

In terms of innovation, we are always looking at what we need to target next. Many of the more common disease areas are rather well-serviced now so we are entering new disease areas that may be more resistant or more complex. For instance, you may have conditions where patients need to undergo various tests or require follow-up monitoring. An example is one of our multiple sclerosis (MS) products. In these situations, we provide services to patients via our patient support programs to accompany them throughout their treatment journey.

I am Canadian, so I experience the Canadian healthcare system personally. I have a family member who was recently diagnosed with wet AMD and each month, she spends five hours of travel and wait time for a five-minute injection!

Prior to my current role, I was the CFO for Novartis (Latin America and Canada), where I had the chance to see the various healthcare systems across Latin America. What strikes me about Canada is that we have an abundance of resources here and we should be able to treat patients in the best way possible – better than we currently do. As one example, when we look at patients suffering from acute heart events, a high percentage of the time when they go to the emergency room, they may be discharged without seeing a cardiologist! That is inadequate.

This is the reality of what patients go through, and this is the reality that we have to change. Canadians need access to innovations. As we move forward with more innovative products, we are really thinking more about the patient journey from beginning to end, and pushing to solve the gaps we see.

What makes Canada so attractive for clinical trials?

It is about the strength and quality of the research centers, hospitals and researchers here. The robust health care systems is also very important because we want patients to start and complete clinical trials; good healthcare infrastructure is necessary for this. In addition, compared to the US,

we are less expensive. As we are based in Québec, the favorable tax environment here is also a significant incentive.

Within the industry, some companies have looked at opportunities to conduct clinical trials in lower-cost countries but it is not just about cost, you also need to consider data quality, patient recruitment, and data delivery. The Canadian clinical trials environment has been very reliable.

In August this year, Novartis became the first company to have a new CAR-T cell therapy approved by the FDA. How significant is this?

This is an important scientific breakthrough. As you know, CAR-T cell therapies are not a pill or traditional chemotherapy. CAR-T therapy is the embodiment of personalized medicine – each injection is tailored individually to, and manufactured for, each patient using the patient's own T-cells, a type of white blood cell. The CAR-T process involves patients' T cells being extracted and reprogrammed genetically outside the body. The altered cells are then reintroduced into the patient with an ability to recognize, hunt and eliminate cancer cells. To have the FDA approve a therapy like this for the first time is a significant achievement and we are extremely proud to be part of this.

We are currently in discussions with the health authorities to obtain regulatory approval for this therapy in Canada. We look forward to partnering with a cross section of healthcare system stakeholders to deliver this innovation to Canadian patients.

On a last note, how would you like the Novartis brand to be perceived in Canada?

I would like Novartis to be seen as changing the practice of medicine in Canada, as well as bringing innovative medicines to patients here.

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