

December 2013

E^{ph}MRA **news**

keeping members informed and involved

**Strategic Plan -
what it means
for members**

Board Update

Full Member Forums

**Off Shoring -
the future is here**

Committee Focus

Code Corner

BRUSSELS 2014

embracing
Change



cultivating
Opportunity

24-26 June 2014 Brussels

**REGISTRATION
OPENS IN JANUARY**

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Diary

14 January 2014

IMM (Interim Members Meeting) London

15 January 2014

Multi Source Synthesis F2F Training, London

24-26 June

Embracing Change, Cultivating Opportunity -
Annual Conference, Brussels

See website for more details.

Get in touch

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Copy Deadlines

January 15th 2014 is the deadline for submitting your copy for the March 2014 News.
Send to: generalsecretary@ephmra.org

Future editions:

June News - Copy deadline 15th April 2014

September News - Copy deadline 7th July 2014

Produced with the Environment in mind



Welcome to **EphMRA news**

It is Q4 time again – where has 2013 gone! Hope you have been keeping busy and thanks to all who have attended our events this year – it has been great to meet you all.

We have started to review our communications and you will read on page 8 that we are putting even more effort into keeping you up to date and informed.

The News has had a style revamp and we have reviewed the structure and article presentation. We will be looking to add more content moving forwards and feature a wider range of articles.

It has been a busy year for EphMRA (two major conferences, the IMM and four Local Chapter Meetings) and the value incorporated into the membership fee is at an all time high. Here are just some of the benefits:

All Members benefit from:

Networking

- Experience exchange with peers and like-minded colleagues

Professional development

- Professional Development Opportunities/Training (online and F2F)
- Complimentary webinars
- Complimentary publications, e.g. Research through the Product Life Cycle, Managing a Research project
- Country Capsules on individual markets

Industry standards

- Code of Conduct and Ethics initiatives
- Code of Conduct online training and competency test – free to members

Events

- Lower registration fees for conferences
- Free attendance at Interim Members Meeting
- Free attendance at Local Chapter Meetings – one-day events addressing nationally focused issues.

We hope to see you again in 2014 and all the best to you and your family for the festive season.

Bernadette Rogers
General Manager
generalsecretary@ephmra.org



EphMRA's Strategic Plan

EphMRA's Strategic Plan will continue to set the gold-standard in healthcare market research

In June this year, EphMRA revealed its future direction. EphMRA President Thomas Hein explains the need for the plan and the principles behind it.



EphMRA has a mission which describes the purpose of the association, and that mission continues to be our guiding light towards our long term goals.

What we now have, with the implementation of our Strategic Plan, is a focused set of guidelines, based on the ever-changing hot topics in pharmaceutical market research, which will shape the way we work to achieve those goals. The Strategic Plan clearly outlines the most important topics that EphMRA, its members and the industry are facing now or can expect to face in the near future, and how EphMRA can support its members through those challenges.

The first of these important topics to be considered by all of us in the healthcare market research industry, is the transformation of market researchers from data and information providers to consultants with business understanding. This is essential for market researchers in both companies and agencies. If market researchers solely provide data and information, further time and man-power has to be given up to analyse it, interpret it and derive conclusions and recommendations. There are more cost-effective ways to obtain data and, if we are not performing the role of integrated business consultants in the way we present data, we risk this work being outsourced to countries with lower labour costs.

We should also consider the importance of providing the highest possible quality of information. Data and information which is interpreted for business by an experienced market researcher with consultation skills and commercial awareness will come with much more valuable recommendations.

Another important topic the Strategic Plan will focus on is one of geography. As our industry becomes increasingly global, the Association recognises that EphMRA members need guidance in their international activities.

As market researchers we should not forget that, for the launch of new innovative products, the markets in USA, Japan, Germany, France, Italy, Spain and United Kingdom are the most important and will remain so for the next couple of years.

To find the most significant emerging markets, we consider a combination of growth rates and the overall size of the respective markets. For the next twelve months, the most important regions will continue to be BRICMST (Brazil, Russia, India, China, Mexico, South Korea, Turkey), with a high focus on China and Brazil. Other countries, for example Colombia, Argentina and Australia, will receive more attention over the following few years. Long term, in 10 to 20 years' time, we should also think about the markets in Africa and prepare ourselves for their emergence.

EphMRA works hard to manage the needs and requirements of its members in this increasingly global industry. Globalisation adds an additional complexity for market research, as the challenges and environments differ from country to country. Data privacy laws, data availability and cultural differences, for example, are unique to each country.

We address this by focusing on the latest key markets for our members, and by working closely with market researchers and sector experts local to each area to gain invaluable insight we can pass on to members. Additionally, we liaise with other organisations such as PBIRG and CphMRA to achieve global standards for important topics, like adverse event reporting.

The challenge for members working with reduced budgets is another key area, and we recognise that we all have to do better with less. As such EphMRA will identify how to effectively communicate the value of healthcare market research and assist members in this challenge.

Other challenges we will address under the direction of the Strategic Plan are increasing regulations regarding primary market research, data privacy and adverse event reporting. Data privacy and fair market transparency will be a key topic for secondary data providers in particular. We will also be working to advise our members on recruiting and training staff with the skills needed to be valued business consultants.

The Strategic Plan has been created with EphMRA's members in mind, and feedback and contribution from our members is essential to the effectiveness of the association. We actively encourage active participation in committee work and regularly ask members to share proposals for future training sessions as well as topics to work on.

All of our future activity will be closely aligned with the Strategic Plan, ensuring that focus is maintained on our objectives at all times. This will be evident through everything from the training provided by EphMRA, speeches and papers at conferences, publication of the committees' output and positive results from discussions with authorities.

With the Strategic Plan in place, EphMRA can continue to set the gold-standard in healthcare market research.

What we now have, with the implementation of our Strategic Plan, is a focused set of guidelines, based on the ever-changing hot topics in pharmaceutical market research, which will shape the way we work to achieve those goals.

EphMRA Strategic Plan

(issued June 2013)

Dear Members

Over the past few months the Board has been crafting this statement about the Association's Strategic Direction in terms of:

- Transformation of market researchers from data and information providers to consultants with business understanding
- Our Target Audience
- Geography
- Doing more with Less

These outlined areas represent the main areas of focus and we will now plan the implementation across all our activities, events and outputs.

The EphMRA Board

Transformation of market researchers from data and information providers to consultants with business understanding.

EphMRA's overall aim: To create an environment that encourages excellence in providing insights combined with business knowledge.

- EphMRA is the hub for excellence in research thinking to empower healthcare market researchers to provide consultancy to the business.

- Driving the development of best practice in healthcare market research.
- Delivering training and opportunities for best practice exchange for healthcare market researchers to develop their understanding of business problems and strategic issues that allows them to provide clear, actionable insights.

Excellence means that EphMRA is setting the gold-standard in healthcare market research and the Association will continue to build excellence by providing training that relates to the strategic components of market research. Furthermore EphMRA will provide guidance to its members to attain the Association's most current standards of excellence and ethical guidelines.

Our Target Audience

EphMRA represents those conducting international healthcare market research and this remains a criteria for membership.

Diagnostics, Devices and OTC will remain in our focus as they are part of the healthcare arena.

Management and marketing consultancies, PR and Advertising agencies offering healthcare market research, and market access companies can participate in our current offerings if they are members of the Association. EphMRA recognises that there is now greater supplier side fragmentation and so the Association must focus on communicating that healthcare market research is a science to be undertaken with a specific skills set and education level. Thus EphMRA needs to give guidance and make aware of standards and guidelines.

Geography

As our industry becomes increasingly global, the Association recognises that EphMRA members need guidance in their international activities. The Association will therefore develop

services and support in those international markets which are a focus for members.

This expansion of EphMRA activities and services will be undertaken within the available resources of the Association.

Doing more with less

In the current environment we all have to do better with less: the trend is that there are now fewer people in healthcare market research, and we are working with smaller budgets and yet the demand for high quality outputs and the need for innovation increases. In many pharma affiliate companies there are no professional market researchers which presents challenges, not least in maintaining high standards of quality and accuracy.

EphMRA needs to:

Identify how to communicate the value of healthcare market research internally and provide examples of excellence in practice in 2 key areas:

- support those who are not professional market researchers conduct market research
- identify how to support those less familiar with market research become better users.



The added value of EphMRA membership in 2014

As we approach a new membership year, EphMRA has been focusing on delivering substantial benefits in line with our Strategic Plan.

Membership for 2014 includes a vast amount of useful and tangible benefits, some of which you'll already be accustomed to and others which are brand new for the coming year.

Build your knowledge

One of the key benefits of a membership is the opportunity to take advantage of EphMRA's commitment to your professional development. We are providing both face-to-face and online training to keep you at the top of your game professionally and abreast of all developments in the industry. We urge all members to take advantage of our complimentary webinars and publications, tailored to suit your professional needs.

Reach out

EphMRA membership offers a number of opportunities to network with others in your field. We'll provide regular opportunities to exchange with peers and like-minded colleagues, stay informed of developments in the industry and boost your contacts.

Join in

EphMRA's calendar of events offers something for everyone, and members are entitled to free attendance for many events and significant reductions to others. Our one day local chapter meetings, for example, have been free for members and address nationally focused issues that matter to you. Our latest chapter meeting in Berlin drew 60 attendees who benefitted from, among other things, the advice of acclaimed lawyer Ralf Tscherwinka on the complex issue of Dienstherrengenehmigung - a hot topic affecting research professionals in Germany today.

Our annual conferences, held over two days, are jam-packed with opportunities for learning, debate, panel discussions and networking. EphMRA members also benefit from significant event discounts.

High standards

Keeping up to date on industry standards can be challenging, but EphMRA works to keep this as simple as possible. For example our Code of Conduct and Ethics initiatives as well as our Code of Conduct online training and competency online test help you to maintain standards within your own organisation across these important areas.

Getting specific

An EphMRA membership can also help members with their own specific needs.

For Full pharma members an EphMRA membership offers:

- The opportunity and resources to combine forces to strengthen the influence of pharmaceutical market research
- Peer-to-peer forums for pharma industry senior managers
- A platform from which to influence information suppliers to ensure they provide high quality data and information. Committees within EphMRA continually work towards influencing data suppliers to achieve this
- A committee update newsletter
- Provision of a database of syndicated services
- An opportunity to vote on changes in the Anatomical Classification System

For Associate supplier members an EphMRA membership offers:

- Peer to peer forums just for supplier attendees
- The opportunity to advertise for free in quarterly EphMRA News (30 words)
- Opportunity to join committees and apply to join the Board (when vacancies arise)

With these improvements to the membership package there has never been a better time to be an EphMRA member.

Membership is corporate – so your company joins (not individuals). Get in touch today to discuss how your company can get involved: contact EphMRA on generalsecretary@ephmra.org.

Building on our communication channels to keep you informed

You will have already noticed some significant changes to this edition of EphMRA News in terms of its design and layout; this is just one part of our recent initiative to further improve our communication with members.

EphMRA has appointed communications experts Beattie Communications, who are working closely with General Manager Bernadette Rogers. As well as redesigning EphMRA News, Beattie Communications has boosted our Twitter, LinkedIn and email communications to all members, providing up-to-the-minute news and updates direct from EphMRA on a regular basis.

We are committed to keeping you informed and involved in all of EphMRA's developments, and the various ways we work for you. The best ways to stay up to date with the latest news from EphMRA are to follow us on Twitter @EphMRA and to join our LinkedIn group, 'EphMRA - encouraging excellence in providing insights combined with business knowledge'. Typing this into the search bar on LinkedIn should bring this up, and you can then easily apply to join the group.

If you'd like to get in touch with the EphMRA team at Beattie Communications to feedback your opinions on the newsletter or any other aspect of EphMRA's communications, email Laura Knight and Siobhan McGrogan at EphMRA@onlybeattie.com.

Board Report

It is always a busy time of the year for EphMRA members and the Board has been working steadily on initiatives to benefit members.

Firstly we would like to welcome all Board members who came into office on 1 October – your Board Full members are:

Full Members voted in at the June AGM as of 1 October are:

Thomas Hein - 2nd term as President

Board members:

Georgina Butcher - Astellas Pharma Europe

Karen Giorgi-Vigo - Shire Pharmaceuticals

Bernd Heinrichs - Gruenenthal

Kerstin Lilla - Abbott

John Shortell - Bayer Healthcare Inc

Thanks to James Rienow from Pfizer who left the Board on 1 October but who will now assist in helping to revise our Association's Statutes which are in need of an overhaul.

Look out for the new website. This has been developed over a period of months this year and offers improved functionality and a more modern look. The old site was based on very dated technology and so we hope this will prove much easier to use and navigate around.

The 2014 Training Plan is also available on the web site (under Events and Training) and as dates are confirmed we will add them to the events diary. For now we will continue to update the document and add other offerings to it as they arise.

We hope to see as many members as possible at the IMM in London, 14 January – this is a complimentary event but offers something for both Senior Managers as well as mid level researchers.

Many thanks

EphMRA Board



Associate Member Update



We hope everyone has had a great summer and is busy closing a successful year in Q4.

The consultations we held with AMs in September focused on eliciting constructive comments about our events and conference. The feedback received was very useful and has already helped us with planning and shaping future offerings. We will keep you updated.

We have already had an introductory call and discussed Board liaison points as well as places for more calls with the Associate Membership. It was agreed that calls with AMs are a productive way of reaching out and it is critical to continue getting input from AMs. Look out for invites to calls arriving in your email inbox.

Please do join us in 2014 at the IMM (14 January, London) where there will be an AM meeting and another opportunity for you to add your voice.

If we don't speak to you before, we hope you all have a very successful end of year, and look forward to seeing you in 2014.

Your new AM board representatives who took their seats on October 1st 2013 are:



David Hanlon

Senior Group Director
Kantar Health
David.hanlon@kantarhealth.com



Richard Head

Director
The Research Partnership
richardh@researchpartnership.com



Kim Hughes

CEO
THE PLANNING SHOP international
Kim.hughes@planningshopintl.com



Gareth Phillips

Managing Director UK and Head of Western Europe
Ipsos Healthcare
gareth.phillips@ipsos.com



Sarah Phillips

Head of Research
Prescient Market Research Ltd
sphillips@prescientmr.com

Full Member Forums

The Full Member Forum is seen as a key EphMRA benefit for Full Members - a chance for networking and peer-to-peer interaction between Senior Managers. These sessions are now a regular feature of both the EphMRA Annual Conference in June and the Interim Members' Meeting in January

At the most recent FM forum, topics included an update on Third Party Agreements from EphMRA President Thomas Hein. There was also a presentation from the Classification Committee on the ATC classification proposals for 2013 and the procedure by which recommendations for new classes are assessed by the committee. Product classification can be a vital part of strategic planning, so it is important for all Full Members to be involved in decisions affecting the ATC system.

Full Members also discussed the increasing enforcement of EU Competition Law in the Pharmaceutical Sector, with a greater focus on various life-cycle management strategies and renewed interest in parallel trade. Data Exchange Programs are coming under greater scrutiny with the aim of ensuring fair market transparency. It was agreed that EphMRA should monitor developments in order to be prepared for changes and that this topic should remain on the agenda for future forums.

At the next FM forum at the IMM in January, the topic of compliance with ethical standards will be on the agenda. The EphMRA Code of Conduct was established in 2009 - a milestone in EphMRA's pursuit of excellence in professional standards. The Code has evolved over time, reviewed and updated annually as significant changes occur, and is now extended to cover 13 countries.

What are the compliance challenges that still remain? Specific geographies? Medical devices? Market research conducted by non-market research departments? These issues will be discussed amongst Full Members in January.

Suggestions for discussion topics at future FM Forums are always welcome. If you have topics to add to the agenda please contact Fiona Lake (engagementofficer@ephmra.org).



committee focus

ATC Classification Committee

ATC Classifications: EphMRA and WHO

Did you know that there are two separate ATC classification systems – the EphMRA ATC and the WHO ATC? The Committee quite often receives questions on the difference between the two.

The EphMRA Anatomical Classification system aims to meet the needs of pharmaceutical marketing research and marketing, while the purpose of the WHO ATC is more clinical e.g. for drug utilisation studies.

The EphMRA system provides guidelines to classify the final marketed product, such as a pack of a statin, whereas the WHO system classifies substances, e.g. atorvastatin.

The code structure is similar to the third level:

EphMRA	C10A1	Statins
WHO	C10AA	HMG CoA reductase inhibitors
	C10AA05	Atorvastatin

EphMRA and the WHO have an active harmonisation programme to avoid confusion between the two systems, i.e. to aim for similar definitions at the third level. A comparison document is produced annually, reflecting new classes in each system, and is published on the EphMRA website.

June 2013 Meeting

London was the venue for our June meeting which was held just prior to the EphMRA AGM and Conference. By then, we had received the voting results from the Membership of EphMRA and PBIRG on the new class proposals for 2014. These include developments in antineoplastics, vaccines, and diabetes. Details of these provisional new classes are on the EphMRA website; the classes will be finalised and published after the December Committee meeting.

We were very pleased to welcome Etsuyo Ogawa (Bayer, Japan) to the London meeting; she is the Liaison Member for Japan and provides valuable assistance on topics relating to the Japanese market.

September 2013 Meeting

Davyd Freeman (Shire) hosted the September meeting in Nyon, Switzerland. Many classification topics were discussed, covering nearly all the ATC classes, and some with no easy answers!

Please note that a summary of current projects and decisions made as a result of the Classification Committee meetings are available to EphMRA members via the EphMRA website.

Committee Membership

We are very pleased to welcome a new candidate member to the Committee from Lilly, Germany. We do still have further vacancies, in particular for an 'apprentice' position. This is an ideal learning opportunity for someone new to the industry. Please contact Bernadette Rogers (generalsecretary@ephmra.org) or one of the Committee members (listed on www.ephmra.org) for further details.

Welcome to EphMRA's newest initiative: The "Forward Thinking" Group

The EphMRA "Forward Thinking" Group was initiated to support EphMRA in delivering key objectives in its Strategic Plan, focused on encouraging excellence:

- Becoming better business partners
- Driving the development of best practice
- "Doing more for less"

The remit of the "Forward Thinking" Group is to help EphMRA members to drive our industry forwards by focusing on future horizons and ensuring that we are responding to current and future commercial pressures in our professional lives.

The Group will identify and advise on "Forward Thinking" in our industry. Topics discussed so far include commercial trends in our industry and working successfully with Procurement. Outputs might range from a full report following primary research, through to white papers / webinars / information packs addressing specific topics or articles in EphMRA News reporting on expert perspectives, with a focus on providing prompt and agile insight to EphMRA members.

Our call for "Forward Thinkers" generated considerable interest and the Group now consists of 12 EphMRA members (Full and Associate), selected on the basis of their ability to contribute to this forward thinking group.

Our members

Alex	Adams	Novartis
Lucio	Corsaro	MediPragma
Dorota	Cudna-Slawinska	Millward Brown
Angela	Duffy	Research Partnership
Carl	Garrard	Eisai
Magali	Geens	InSites
Fenna	Gloggner	Novartis
Saliha	Idir	Pfizer
Tim	Lynch	FocusVision
Ahmed	Nour ElAlaloui	Novartis
Piergiorgio	Rossi	SGR
Nick	Voysey	Janssen

If you would like to join us, please contact Bernadette Rogers (General Manager) generalsecretary@ephmra.org or Sally Birchall (Group Chair) foundationchair@ephmra.org and ask for an application form.

Consumer Health Committee

Growing numbers of pharma companies are now involved in Consumer Health, either as a dedicated business team or as a Consumer Health Division. Business models are evolving, increasingly blurring the borders between the classic prescription-bound and OTC worlds.

After canvassing opinion from EphMRA Full Members, there was found to be considerable interest in founding a new Consumer Health Committee, particularly as several pharma companies flagged up the difficulties involved in harmonising OTC and Rx data universes.

At the EphMRA conference in London, the Consumer Health Committee was launched. At this first face-to-face meeting, the following mission statement was established:

‘EphMRA Full Members working together to ensure that OTC data and systems provide the most suitable platform for international secondary market research in Consumer Health.

By liaising with suppliers the committee aims to improve existing OTC data and systems in terms of quality and greater transparency of content.’

Committee activities will include:

- Working to build more consistent definitions of OTC data across countries to ease harmonisation with ethical data sources and provide greater analytical flexibility
- Identifying current unmet needs in Consumer Health market research and addressing these with suppliers.

The Consumer Health Committee works in close co-ordination with the EphMRA Data & Systems Committee to encourage the establishment of an integrated data picture and ease analysis across OTC and Rx data sets.

The first priority of the Consumer Health Committee has been to liaise with IMS on OTC panel coverage. Currently the committee is working with IMS to gain a comprehensive picture of OTC panel definitions, structure, collection methods and channel coverage and to suggest improvements.

The committee will also be working with IMS to look at OTC classification issues and country-specific issues such as the flagging of Traditional Chinese Medicines in the China panel.

The Consumer Health Committee has also been making contact with other OTC data providers and will be working to inform EphMRA membership on the range of OTC data services available.

Seven pharma companies are represented on the Consumer Health Committee:

Sanofi Consumer Health: Anne Lalechere-Gonzalez

Boehringer Ingelheim: Suzy Migray

GlaxoSmithKline: Graham Pride

Merz Pharmaceuticals: Marco Koch

Pierre Fabre Medicament: Lionel Dechelette

Bayer Healthcare LLC: Kevin O'Hara

Pfizer Consumer Healthcare: Sapan Amin

The committee would be very pleased to receive enquiries from other Full Members wishing to help improve OTC data sources and systems. If you would like to contribute, please contact Fiona Lake
engagementofficer@ephmra.org.

Learning & Development Committee:

Following the successful Masterclasses and Workshops undertaken at the annual conference, held in June in London, the Committee has been working on its contribution to the overall Training Plan. We have published EphMRA's 2014 Training Plan on the website which shows what we have on offer – much of it free to members.

Thanks to the Committee for helping to steer the programmes:

Sandra McAuliffe - Committee Chair, UK.

Julie Buis - Aequus Research, UK

Peter Cunningham - Branding Science Group, UK

Rich Kaminsky - Boehringer Ingelheim, Germany

Dorothy Parker - Fastforward Research, UK

Alexander Rummel - Aurum Research, Germany

Syndicated Data Committee

The SDC is a small, active committee, dedicated to meeting the objective of raising awareness and understanding of syndicated data sources. The committee members are as follows:

Karen Cooper - Chair of SDC, UK
Reenu Dosanjh - Merck Serono, UK
Stefano Gandolfi - Pfizer, France
Marika Peters - Bayer, Germany
Narges Shahangian - AstraZeneca, USA

The SDC is keen to hear from anyone interested in its activities, or indeed, anyone wishing to join the committee or help out on specific projects. If you have any feedback or suggestions, please contact the SDC at SDCCommitteeChair@ephmra.org

The Database of Syndicated Services

During 2013 the SDC has been working on developing a Database of Syndicated Services. This is a facility for full members (pharmaceutical companies), providing a searchable repository of syndicated data services.

Please keep an eye out for emails and newflashes providing more information about this service. If you want to find out more please get in touch with the SDC, via the email address above.

OpenData

OpenData provides EphMRA members with an easy means to access 'free' information on the web. OpenData pulls together secondary and demographic data from a series of standard sources such as WHO, CIA Factbook, World Bank and Eurostat along with many others. For a pre-defined list of disease areas, the database provides links to epidemiology, drug treatment and other information.

The SDC has produced a series of case studies that are available on the website. Here is the latest to demonstrate the database in action:



All case studies can be found on the EphMRA website under the Syndicated Data Tab.

New Form Codes Committee

Congratulations to the NFC Committee on their Silver Jubilee - it is 25 years since New Form Codes (NFCs) were introduced as an international standard for dosage forms.

The New Form Code classification replaced the Three Letter Code that was originally introduced in the mid 1960s but which, by the 1980s, required revision. A working party was pulled together to develop a unified worldwide classification system for dosage forms and the NFC was born. The NFC first appeared in audits and databases in 1988, 25 years ago.

At that time the New Form Code Committee was also established to ensure the system remained relevant and, since then, the NFC classification system has undergone much change to keep pace with industry developments and to ensure it remains consistent and easy-to-use.

In recent years this has included new classes for Auto-injectors and, for 2014, a new second level NFC will be established for cartridges allowing easier monitoring of market switches, such as the move to injection pens in the diabetes market.

Looking to the future, the NFC Committee continues to monitor developments in needle-free devices, micro-needle arrays, and new oral or inhalable delivery technologies.

If you would like to join the team that helps shape dosage form coding across our industry please do not hesitate to contact one of the committee members:

Dr Johannes Niessing (Chair) - Boehringer Ingelheim
 Ms Aline Abravanel - BD Medical
 Ms Helen Harbrow - IMS Health

Offshoring: the future is here



Offshoring is not just the future for pharmaceutical market research, it is what's happening right now. Outsourcing some – but not all – services in a function to a provider in a lower-cost country has been going on for 20 years: first when companies started moving production to China, then when India began to be seen as an attractive place for software development and IT a decade or so ago.

And this is the case now with data management as well. In the digital age, information has never been more accessible – but this means you can access far more data than you could ever use and finding the time and budget to analyse it is the real problem. Data itself is no longer what makes you stand out: instead those of us in market research need to move towards generating customer and market insights – in other words, how you translate the information you have into improvements in your bottom line is the really important thing.

Market research must adapt and change to take account of these changing times: companies need more insights and we have to provide them through consultancy to brand teams and other management functions, using what our offshore providers are doing to provide analysis for our business. This is something you simply can't provide by just reporting on retrospective market data. As an industry we have to become more strategic – and if market research refuses to fall in with this trend then there is a high risk that departments will be offshored whether they want to or not.

The market research team of my own company, Bayer HealthCare Pharmaceuticals, started this journey in 2010 by linking up with an Indian company, Evalueserve. Reducing cost is an issue but, although it is cheaper to operate in India than in Europe, we didn't go for the cheapest option. We had a shortlist of 8-10 agencies in Delhi, Bangalore and Mumbai and met them all.

It makes no sense for a company to offshore to a lower-cost country just to save money – we need to know that our partner's employees are treated well, paid fairly, receive good training, have goal settings, get healthcare benefits and so on. We need well-educated, highly motivated people striving for success – to make offshoring a commercially-viable option you need quality and flexibility, the ability to handle fluctuating workloads and the capacity to react to changes in skills requirements.

So what is it possible to offshore? Standard reporting and simple



Thomas Hein

analytics are an obvious starting point, followed by competitive intelligence and complex analytics when both sides are confident enough that this can be handled.

It's crucial to remember that you can't expect offshoring to do everything you need at the beginning. It takes time, just as if you were building a factory: you can't build one and run production at the same time, you just have to hope that the output will be there. If you hire a new co-worker in your core team they won't deliver 100% from the start either.

So if you select the right partner they will learn quickly, but things will necessarily be slow at the start, getting faster as you move through the transition stage. This means savings are lower at the beginning because of your set-up costs and the time you will have to invest. Expectation management – especially perhaps when managing upwards – is crucial here.

There are challenges and risks too, of course: on the staff side people can be hostile and resistant to change, scared that their jobs will be transferred to faraway countries. Operationally, there are legitimate concerns about losing control and data quality, and about how your IT and operating systems will talk to each other.

To overcome this, you must be actively involved in steering activities, with periodic tracking of quality on KPIs. For example, if you see that things are beginning to drift in the wrong direction – over prioritisation of tasks, for example, or confusion over deliverables – then you must not let it escalate. From the start we had a clear communication plan: for the first 12 to 18 months only one person at Bayer Healthcare Pharmaceuticals – me – was allowed to give instructions and only one person at Evalueserve was allowed to receive them. After this strict phase we expanded that to say that for defined tasks such as competitive intelligence, 'here is your contact', then we expanded further. Otherwise it would have been chaotic.

Continued over...

Continued from over...

Consciously working on integration is important: you have to make your offshoring partner's team feel that they are part of your team. It can't be a supplier-client service contract – instead it has to be a people partnership. Decision-making has to be participatory rather than dictatorial. We meet each other four or five times a year and take individual co-workers to see one another to familiarise and socialise.

For those considering offshoring my advice would be: don't think of this as a threat, but look at it as an opportunity and work out how to be actively involved in driving activities. It is better to do this than be offshored in the future. Because offshoring will be happening more and more: in market research we will always have to demonstrate what additional value we bring to the business – and the way to do that is to be as close as possible to it. If you are simply reactive, gathering information and producing reports, then your function is vulnerable – but if you are using that information to act as a consultant and networker, making recommendations for moving the business forward – that cannot be offshored. These are the new core activities – and you may even see an increase in headcount. And even though functions like data and reporting are no longer core assets, you have to keep those skills and knowledge in-house, not least so you know where your offshored functions should be heading.

A final point: you must be both sensitive to the country you are going to, and culturally curious about it. Your mindset and mood is really important: you must socialise, get used to their way of doing things and establish personal contacts. The process isn't just about the technical – although that is important, of course – it is also about patience and empathy. And above all, remember to maintain contact. Understanding one another, working with each other and providing timely, candid feedback will give you the best chance of making your venture a success. At Bayer we aren't losing control, we are simply expanding the reach of our global market research team. Above all, we are adding value.

Dr Thomas Hein is President of EphMRA

Code Corner

In Brief

Updated Adverse Event Reporting Guidelines

EphMRA has updated its Adverse Event Reporting Guidelines to take account of the *Guideline for Studies in Public Health Service for Purposes of Market and Social Research* issued jointly by the German market research industry associations. This Guideline allows adverse event reporting in Germany without the transfer of personal data to the client company. The opportunity has also been taken to add some clarifying detail upon the basis of the Adverse Event Reporting Guidelines and the definition of an adverse reaction.

2014 Code of Conduct Consultation

As you are aware EphMRA is continuously developing the Code of Conduct. We get a lot of feedback and comments on the Code from members, which is very useful as it helps us to continually develop the Code.

To enable the Ethics Committee to give the comments received due consideration, we initiated an annual Code Consultation period. In preparation for the 2014 update all members were invited to submit comments until 6 November.

The Ethics Committee will review your feedback and take it in to account as far as is practical and appropriate within the updated Code.

News on Disclosure and Transparency

(correct as of 22 October 2013)

On August 1, 2013, the first reporting period under the **US Physician Payment Sunshine Act** began and consequently the PMRG, CASRO and MRA issued an alert that addresses key questions. You will find this alert on the three associations' websites.

EphMRA has recently issued an update on the **Loi Bertrand in France**. If you haven't yet seen this, it details the work undertaken by EphMRA with ESOMAR to monitor the developments following the adoption of enforcement decrees of the Loi Bertrand.

French associations SYNTEC, UDA, and ADETEM have been consulted along with ESOMAR and these national associations are still engaged in various activities on behalf of market researchers operating in the French market.

The Loi Bertrand entered into force on 21st May 2013. Its objective is to increase transparency within the health sector in particular as regards the giving and receiving of gifts within the medical profession. It has been inspired by similar laws in place in North America.

What the law requires is the reporting of any and all gifts or incentives given to the profession (directly or indirectly), which exceed a value of EUR 10. The law requires publication of these to a centralised website where the public can search and scan what gifts have been given and received. Records of these incentives will need to be published for 5 years and archived for a further 10 years.

The enforcement decree was until recently unclear about whether market research incentives would be covered by these requirements. It was hoped that clauses exempting certain commercial conventions would be sufficient for research to not have to face these reporting requirements.

However, recent meetings with French authorities organised by French local associations have led to the responsible ministry confirming that the application of the law would also cover incentives paid out by research agencies when conducting surveys.

Regardless of whether your agency is based in France or working from outside France, the Loi Bertrand is applicable to all agencies operating on the French market.

ESOMAR's Government Affairs team is liaising with French associations supporting initiatives to secure the removal from scope of market, social, and opinion research.

Additionally, **EFPIA** have recently issued a **new Disclosure Code** which has to be implemented locally in 2016 (retrospective for 2015). EphMRA is currently discussing and clarifying the implications for market research and will keep members up to date with news.

Liaison with the EMA

EphMRA continues to work with the European Medicines Agency's (EMA) to provide a clear understanding of the role of market research and the practicalities of forwarding adverse events from market research studies so that this can be taken into account in future implementation guidelines.

EphMRA is awaiting EMA input on how to address the management of safety information when some of the minimum reporting criteria are missing for individual case safety reports to be valid. We will let members know of further developments as soon as we can.

Code of Conduct training

So far, more than 600 members have taken the Code of Conduct Competency Test since it was introduced and over 300 have completed the online training module. If you wish to join these growing ranks, the training and the competency test are available free of charge on the EphMRA website.

2014 Webinars

There are plans for a joint EphMRA/ESOMAR ethics webinar on 3 April 2014, we'll be in touch again when the agenda is finalised.



Code enquiries

Code enquiries continue to come in to us every week, covering a very wide range of topics. If you have any questions on the EphMRA Code of Conduct, the confidential Code Enquiry service is available on the website for all EphMRA members free of charge.

Code of Conduct brochure available

EphMRA has produced a Code of Conduct brochure which clearly and simply explains what the Code is and why it exists. It also explains the Code support services available - the confidential enquiry service, training and competency accreditation. If you want copies of the brochure for your staff, your suppliers or your customers, please contact Bernadette Rogers.



People News



Exafield is pleased to announce that Cristiane Sand will manage our new subsidiary in Brazil. With experience of 12 years in pharma fieldwork, she's joining our European teams.



New Research Manager. We welcome Christel Harte (née Crausaz) back from her maternity leave. Based at our headquarters in Gland, near Geneva, Christel manages global qualitative and quantitative research projects.



Dr Allison Fleetwood has joined the Research Partnership as a Director working within the syndicated market tracking division, Therapy Watch, at the company's London headquarters.



Incite is pleased to announce the opening of new offices in New York and Singapore and two new starters to the London office, Samantha Martin and Elizabeth Eckardt (nee Wolstencroft).



InSites Consulting

InSites Consulting welcomes Helen Fricker as a Research Consultant in their UK team. Next to that Andy Gouanvic joined the dedicated global InSites Consulting Health team.



TAB Healthcare is very proud to announce that our team keeps growing with a new member on Board. Valentin Perales is looking forward to managing your projects in Spain.



the research power behind great brands

Millward Brown Healthcare announce two new Client Managers. October has seen Becky Walker (qualitative) and Mirja Robinson (quantitative) both joining Millward Brown as Client Managers in their growing Healthcare Practice.

Services News



iCONSULT Matrix™ improved for idea generation and new product assessment. Simulations based on the customer's view of the market. Find out if your ideas match needs and potentials. matrix@iCONSULT.de +49/(0)89/544 241-0



expect great answers

SKIM is expanding its oncology market research expertise by starting a meta-analysis of all oncology projects performed over the past five years. Results expected in 2014! Contact: Mike Mabey m.mabey@skimgroup.com



ADELPHI RESEARCH UK

Does your brand tracker really reflect the market? Our new service traxion™ provides complete brand equity measurement using gamification and app technology for more accurate and measureable results.



'Patient Pulse' centrality framework uncovers the drivers of engagement throughout the patient journey. Using digital technologies we capture 'real time' experiences to improve compliance and advocacy. Read more at www.hallandpartners.com



Data Intelligence is a leading provider of BI services to global pharma companies. New contracts with Celgene and Daiichi Sankyo Inc. increase global reach. New product launches coming soon. www.data-intel.net



A new portal for pharmaceutical and healthcare markets has been launched by PMR. Recent news, in-depth analyses, forecasts, industry indicators and regular free e-newsletter at: www.ceepharmaceutical.com

EphMRA IMM2014

Interim Members Meeting, 14th January 2014, London

Join EphMRA Colleagues for discussions on:

Senior Managers: 'Big Data or Big Ideas' and 'Does Big Data give us the power of prediction?'

Mid level researchers: 'The art of proposal writing...selling your wares and putting the customer first' and 'Enabling people to express themselves better - getting more from your respondents'

