



Policy lessons from COVID-19

Savanta ComRes research report for Teva Pharmaceuticals

Executive Summary

COVID-19 response

The outbreak of the first wave of the COVID-19 pandemic across Europe had significant impacts on the lives of European citizens, most obviously in terms of increased death rates and hospitalisation of large numbers of patients.

Teva Pharmaceuticals wanted to understand the views of key health sector stakeholders from across the European Union (EU) of responses to the pandemic by Governments and the pharmaceutical sector, and what policies would be required in the future.

To do this, Savanta ComRes were commissioned to conduct thirty depth interviews with stakeholders representing physicians, hospitals, pharmacy, patients and wholesalers from five European countries, plus Brussels (EU). Topics including initial responses, impact on non-COVID patients, and suggestions for future policy asks were covered in the thirty minute telephone interviews.

The response by Governments and health authorities is considered mixed by stakeholders representing key healthcare sectors.

Stakeholders cite the speed with which these organisations reacted in terms of developing laws to protect citizens and reorganisation of healthcare delivery as **successes...**

... but communication and testing and tracing systems are considered **areas for improvement.**

The objectives of the research were to explore:

- What went well and what was a success among Europe's response to COVID-19;
- What could have been done better and suggestions as to how countries might improve;
- What specific processes and cooperation can stakeholders identify as important in successes or focus for future improvements;
- What the future for the sector looks like and what the pharmaceutical industry should be engaging EU and national Governments on.

Access to treatment

The significant impact of the pandemic on non-COVID-19 patients cannot be underestimated. The focus on the pandemic to the exclusion of all other physical and mental health conditions is predicted to leave long lasting impacts. This is an area stakeholders think should be managed better in the future.

Manufacturing in Europe

Almost all stakeholders think it will be important to secure production of essential medicines and APIs in Europe. This is considered not in isolation, but as a diversification of sources to ensure security of supply. Some believe that it could become ever more cost effective to produce in Europe if the right policy reforms would take place.

Policy recommendations

Looking to the future, stakeholders perceive there to be several key policy areas the pharmaceutical sector can be speaking into.

01

COVID-19 response & Beyond: regulatory flexibility to continue to ensure security of supply of essential medicines and continued co-operation and communication between all parties of the healthcare delivery system

02

Access to treatment: The structural change experienced in healthcare in the hastening of digital technologies is recognised as a significant shift in delivery

03

Manufacturing in Europe: the importance of securing production of essential medicines and APIs in Europe as well as the supply chain overall, to ensure the availability of medicines and develop a holistic supply plan for Europe

04

COVID-19 vaccine: The development and successful delivery of a COVID-19 vaccine is clearly a response required by the pharmaceutical industry, and stakeholders consider how the process is communicated is an important factor

