Current Updates on ASEAN Pharmaceutical Harmonization

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Presentation Outline

- Introduction
  - ASEAN Profile
  - ASEAN Healthcare Integration
  - ASEAN Pharmaceutical Market
- ASEAN Pharmaceutical Harmonization Initiative
  - Objectives & Scope
  - Strategies
  - Achievements
  - Impacts
- Way Forward
  - Plan of Action
  - Potential Areas for Collaboration

ASEAN : One Vision, One Identity, One Community

ASEAN Profile

- Association of Southeast Asian Nations (ASEAN) formed on 8th Aug 1967 in Bangkok, geo-political & economic organisation of 10 countries, located in SE Asia
- Indonesia, Malaysia, Philippines, Singapore, Thailand, Brunei Darussalam, Myanmar, Cambodia, Lao PDR & Vietnam.
- Aims – accelerate economic growth, social progress, cultural development and protect peace & stability
- Land area – 4.46 million km sq, 3% of total land area of Earth. Population – app 600 million, 8.8% of world population
- Combined nominal GDP US$2.4 trillion in 2013
- As single entity, ASEAN ranks as the 8th largest economy in the world
- ASEAN Charter, signed Nov 2007, enforced Dec 2008 turns ASEAN into a legal entity & aims to create a single free trade area for the region.
- Regional cooperation – 3 pillars – security, socio cultural & economic integration

ASEAN Free Trade Area (AFTA)

- AFTA is a collective effort by ASEAN to reduce/eliminate tariffs in intra-ASEAN trade in the goods sector.
- Objective of AFTA is primarily to enhance ASEAN's position as a competitive production base for regional and global markets
- ASEAN population provides enormous potential for market expansion.
- Trend of increasing ASEAN trade : Total ASEAN trade 2010 (US$2.04b), 2011 (US$2.39b), 2014 (US$2.54) – *ref World Bank*

ASEAN Pharmaceutical Market

- SEA fast growing & flourishing pharmaceutical market. Attractive market for US & Japan
- Immense growth opportunity within pharma industry & huge untapped growth potential
- Pharma sales > US$ 20 billion end 2014
- Asia's healthcare sector projected to be a third of global market by 2015
- Medical tourism, low costs, resilient economy & higher compliance to standards
- Rising wealth, ageing & growing population
- Demand for quality healthcare
- Increasing level of access & affordability to medicines

Potential Markets

- **Thailand** : Total healthcare market US$15.8b in 2013, US$240 per capita spending in 2013
- **Indonesia** : Pharma market value increased from US$5 b in 2013 to US$9.9b by 2020
- **Philippines** : US$4.3b in 2013 to US$8b by 2020
- **Malaysia** : US$3b, double digit growth, US$400 per capita healthcare spending in 2013
- **Singapore** : Per capita healthcare spending >US$2,400 in 2013
- **Vietnam** : Per capita healthcare spending grew from US$25 in 2003 to US$100 in 2013

ASEAN Healthcare Integration

- Healthcare one of 12 priority sectors identified for ASEAN economic integration.
- Roadmap related to pharmaceuticals:
  - Study feasibility of an ASEAN MRA for pharmaceutical products
  - Implement ASEAN Common Technical Dossier (ACTD)
  - Harmonise labelling standards
  - Explore feasibility of adopting a harmonised placement system for pharmaceutical products
  - Facilitate approval process after full implementation of the ACTD
  - Explore the feasibility of twinning systems to enhance regulatory capacity and resource development
  - Formalise a post-marketing alert system for defective and unsafe pharmaceutical products

ASEAN Economic Community 2015

- **AEC Blueprint**
  - Adopted Nov 2007, serve as a coherent master plan
  - Transform ASEAN into a region with free movement of goods, services, investment, skilled labour & free flow of capital
- **AEC envisages key characteristics** :
  - Single market and production base
    - Removing non-tariff barriers to trade
    - Enhancing trade facilitation
  - Building a highly competitive economic region
  - Equitable economic development
  - Integration into global economy

Inception of PPWG

- **1992**
  - ASEAN Consultative Committee for Standards and Quality (ACCSQ) formed to facilitate and complement the ASEAN Free Trade Area (AFTA).
- **1997**
  - ASEAN regulatory bodies authorized to achieve mandate of eliminating technical barrier to trade.
- **1998**
  - Efforts to harmonize regulatory requirements amongst ASEAN initiated through ACCSQ.

Formation of PPWG

- **1999**
  - Concept of ASEAN pharmaceutical harmonization presented by Malaysia. Agreed upon by the Senior Economic Officials Meeting (SEOM)
- **1999**
  - Pharmaceutical Product Working Group (PPWG) formed.
- **1999**
  - Malaysia appointed Chair & Thailand Co-Chair.

Objective of PPWG

- To develop harmonization schemes of pharmaceutical regulations of the ASEAN member countries to complement and facilitate the objective of AFTA, particularly the elimination of technical barriers to trade posed by regulations, however without compromising product quality, efficacy and safety.

Scope of PPWG

- Exchange of information on existing requirements and regulations
- Review requirements and regulations, and conduct comparative studies
- Study other harmonized procedures and regulatory system
- Develop technical requirements
- Establish common technical documents towards achieving MRA

Strategies

- Comparison of existing product registration requirements for pharmaceuticals
- Development of common technical requirements (CTR) for pharmaceutical product registration
- Development of common technical dossier (CTD) towards MRA
- Implementation of harmonized ASEAN Pharmaceutical Product Dossier

Chronology

- Sept 1999, Kuala Lumpur
- Mar 2000, Bangkok
- Feb 2001, Ho Chi Minh City
- Sept 2001, Bali
- Feb 2002, Yangon
- Sept 2002, Siem Reap
- Jul 2003, Penang
- Jul 2004, Bangkok
- Feb 2005, Manila
- Aug 2005, Singapore
- Mar 2006, Hanoi
- Nov 2006, Jakarta

- Jul 2007, Kuala Lumpur
- Feb 2008, Vientiane
- Jul 2008, Brunei Darussalam
- May 2009, Manila
- Jul 2010, Yogyakarta
- June 2011, Singapore
- July 2012, Bangkok
- May 2013, Bali
- June 2014, KL
- Mar 2015, Vientiane
- Oct 2015, Manila
- May 2016, Siem Reap

Common Technical Requirements

- ACTR/ACTD on Quality
  - Indonesia
- ACTR/ACTD on Safety
  - Philippines

- ACTR/ACTD on Efficacy
  - Thailand
- ACTR/ACTD on Administrative Data, Product Information & Glossary
  - Malaysia

Technical Guidelines

- Guidelines on Analytical Validation – Thailand
- Guidelines on Process Validation – Singapore
- Guidelines on Stability Studies – Indonesia
- Guidelines on BA/BE Studies – Malaysia
- Guidelines on Variations – Malaysia

ASEAN Harmonized Products

- ASEAN Common Technical Requirements and Dossier (ACTR/ACTD) on :
  - Quality, Safety and Efficacy
  - Administrative Data and Glossary
- Guidelines on Analytical and Process Validation
- Guidelines on Stability Studies
- Guidelines for Bioavailability/Bioequivalence
- Guidelines on Variations

JSC on ASEAN Sectoral MRA on GMP Inspection of Manufacturers of Medicinal Products

- JSC on MRA on GMP Inspection : Chair Singapore, Co-Chair Malaysia
- Indonesia, Malaysia & Singapore - PIC/S members. Thailand expected to become member soon.
- Thai FDA accepted & included in List of Accepted ASEAN Inspection Services
- FDA Philippines currently being assessed to be listed
- Proposal to expand scope to include biologics when 5 listed
- Indonesia hosted PIC/S Seminar, 7-9 Oct 2015, Bali
- Proposed cooperation agreement ASEAN PPWG & PIC/S (MoU) – TOR drawn

Benefits of ASEAN Sectoral GMP MRA

- Avoid duplication of GMP inspections within ASEAN
- Save time, resources & costs for regulators & industry
- Facilitate trade in medicinal products across ASEAN
- Quicker access of medicinal products hence benefit patients & consumers
- Increase competitiveness of ASEAN vs India, China, Japan, EU, US & other industrialised countries

MRA on BE Study Report

- BA/BE Task Force developed draft Sectoral MRA on BE : Indonesia & Malaysia
- Final draft MRA BE endorsed by PPWG & ACCSQ – Mar & Apr 2016
- Endorsement by SEOM - Apr 2016
- AEM expected to sign MRA BE - Aug 2016
- Roadmap for implementation
  - Proposed implementation – 1 Jan 2021

Benefits of ASEAN BE MRA

- Avoid duplication of BE inspections
- Save time, resources & costs
- Facilitate & promote trade of generics
- Benefit patients & consumers – affordable & accessible generic products
- Improve healthcare budget - cost containment
- Contribute towards AEC 2015 – highly competitive region, single market & production base, fully integrated into global economy

International Collaboration

- WHO Cooperation
  - Vaccines
    - Pre-Qualification
    - Regulatory framework
    - Capacity building for NRA
  - Combating Counterfeit Drugs (SSFFC)
    - Global cooperation
- Global Health Regulatory Team
  - New product development
- ICH Global Cooperation Group
  - Capacity building – self learning packages
  - Sharing of information - Webinar
  - Global network

Key Issues

- Infrastructure
  - Political, legal, regulatory & financial
- Human resource development
  - Capacity & capability
  - Collaboration with dialogue partners
- Implementation of ACTD/ACTR
  - Lack of understanding/clarity/consistency
  - Disparity in interpretation of ACTD/ACTR contents
  - Variations - country specific requirements
- Shared responsibility
  - Regulator & industry commitments
  - Regulatory collaboration – AWGPD, APEC, APAC, DIA

Key Milestones

- 1999 – PPWG
- 2001 – Development of ACTR & ACTD
- 2002 – Adoption of ACTR/ACTD & Technical Guidelines
- 2002 – IWG Formation
- 2005 – GMP Taskforce
- 2006 – BA/BE Taskforce
- 2009 – ACTD/ACTR Implementation
- 2010 – Signing of GMP MRA
- 2011 – Implementation of GMP MRA
- 2012 – TWG Biologics
- 2013 – Drafting of ASEAN BE MRA
- 2014 – Listing of GMP Inspection Services
- 2015 – ASEAN WHO Project on SIAHR
- 2016 – Endorsement & signing of BE MRA

Impact of PPWG

- Integration into global economy
  - MRA GMP
  - MRA BE
  - WHO Pre Q
- Organizational & regulatory reforms
  - Regional & national
- Establishing MRA
  - Mutual recognition
  - Confidence building
- Improving healthcare
  - Quality, safety & efficacy
  - Access & affordability

Action Plan : 2015-2025

- Expansion of scope for GMP Inspection MRA
- Increase listing of inspection services
- Accession into PIC/S
- Signing of ASEAN Sectoral MRA on BE
- Requirements for Biologics in ACTR/ACTD
- ASEAN WHO project on Supporting the Implementation of ASEAN Harmonized Requirements for Drug Registration (SIAHR)
- WHO collaborative registration procedure (Pre Qualification)

Potential Areas for Global Collaboration

- New Products
  - Biologics – vaccines, blood products, biosimilars
  - Tropical/Neglected/Rare diseases/Orphan drugs
- Registration Process
  - Technical workshops
  - Joint assessments/reviews
  - Single dossier submission – EU Centralised Procedure, WHO Pre Q
- Regulatory Convergence
  - APEC
  - APAC
- Integration in global economy - GMP
  - ASEAN PIC/S
  - ASEAN AANZFTA SC-STRACAP
  - ASEAN EU ARISE

Strengthening Implementation of ASEAN Harmonized Requirements (SIAHR)

- WHO - PPWG Collaboration
- Pilot Project
  - Collection & analysis of data,
  - Country visits & consultations
  - Identification of gaps
- Proposed Next Step
  - Technical workshop for reviewers
  - Conduct joint assessments within specific timelines
  - Prioritized products
  - Member States make own decision

Conclusion

- **Harmonization**
  - Full implementation of ACTD/ACTR & Technical Guidelines
  - Quality & reliable dossiers
- **Compliance to Best Practices**
  - GMP, GLP, GDP, GCP
  - Good Regulatory Practice (GRP), Good Governance in Medicines
  - Good Submission Practice, Good Review Practice, Good Pharmacy Practice
- **Regulatory Processes**
  - Effective : Qualified reviewers, Good Quality System – SOPs, Tools
  - Efficient : Timeliness, multiple pathways, fast tracks, streamlined, referencing, partnerships
- **Integration in global economy**
  - Strong political will & visionary leadership
  - Elimination of technical barriers to trade
  - Commitment towards regulatory convergence

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