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## Ready or Not Here Comes Pharma 3.0

**PHARMA 2.0 WAS SO LAST DECADE.** Thanks to the good folks at Ernst & Young, who have coined the term Pharma 3.0 to describe a new ecosystem of healthcare, we are indeed entering new territory. As noted back in February, nontraditional pharma companies, such as Nintendo, are becoming an integral part of the patient experience. Nintendo's deal with Bayer brought the Nintendo DS enabled blood glucose meter, DidgetOr to the U.S. market.



According to published reports, this is the first glucose meter that plugs directly into a game console. Once the meter has taken a reading, the user syncs it with a Nintendo DS handheld and boots up an adventure game called Knock 'em Downs World's Fair. The program rewards players for performing a prescribed number of tests each day by bestowing points that speed the player through the game. Additional points are earned for staying within target blood-sugar ranges, which parents can program in.

It is these types of transformative partnerships that will redefine the industry's roster of players as well as the playing field.

A couple of quick stats from Ernst & Young illustrate that the 3.0 movement is gaining momentum. According to the analysts, pharma companies have expanded the number of Pharma 3.0 initiatives by 78% since 2010. Yet nontraditional players have invested even more in Pharma 3.0, a reported \$20 billion in intended investments in the health outcomes space. And because the pharma ecosystem is growing more complex, Pharma 3.0 initiatives are expanding to include a broader scope of technologies, disease categories, and stages in the cycle of care.

It will be no surprise to anyone who has a smartphone that the one technology that has taken off is the app. Between 2006 and 2009, 11% of Pharma 3.0 initiatives were smartphone apps. In 2010, the segment exploded — 41% of Pharma 3.0 initiatives were smartphone apps.

EY reports that pharma companies also are expanding their 3.0 focus into a broader range of disease categories. Between 2006 and 2009, diabetes and metabolics accounted for 24% of Pharma 3.0 initiatives. In 2010, oncology claimed the top spot, with 15% of the year's initiatives, while diabetes and metabolics tied for second with immunoscience/inflammatory diseases (12% each).

According to EY, pharma companies will learn how to connect information, engage in radical collaboration with new partners, and develop multiple business models if they expect to navigate in this new ecosystem. Please turn to this month's Forum, in which our experts discuss the intricacies of nontraditional partnerships, the advantages, and challenges with this new dynamic.

For me, I wonder if this means there's hope for a Ms. Pac-Man revival.

Regards,

Taren Grom  
Editor

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Managing Editor



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Senior Editor



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**KIM RIBBINK**  
Features Editor



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Contributing Editor



*Healthcare reform is reverberating throughout clinical development, including the earlier stages once unaffected by concerns such as a cost-benefit ratio.*

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