

EU5 PRMA Environment In a COVID-19 Context

March 2020

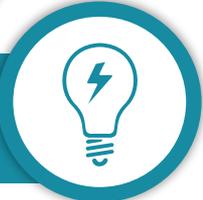
FOCUS OF THE ADVISORY BOARD WAS EU5 PRICING, REIMBURSEMENT AND MARKET ACCESS (PRMA) ENVIRONMENT

Following topics covered with this briefing focused on COVID-19

COVID-19 short and long term impact on PRMA



Top measures to manage budgetary/funding challenges/pressures



Key environmental changes likely to re-shape PRMA



Key challenges for funding Innovative/transformative meds in near future



Gross to net pricing trends



Advisory board participants included former and current payers/payer advisors

COVID-19 PUT SIGNIFICANT SHORT-TERM STRAIN ON ALL ASPECTS OF THE HEALTHCARE SYSTEM

Questions on investment priorities in the healthcare systems

- Where were the gaps in our decision making?
- How will we learn from this and develop a plan going forward?

Immediate changes implemented in some countries

- UK: Adjustments to evaluations and areas of focus
 - SMC suspended for at least 3 months (as committee is mostly clinicians) while NICE is continuing meetings virtually
 - NHS given a “blank check” for items deemed to address high impact priorities (e.g. switching from warfarin to direct oral anticoagulants to free up outpatient hospital capacity)
- Germany: Multiple new laws around healthcare are being implemented weekly

LONGER TERM COVID-19 WILL CHALLENGE PRIORITIES AND APPROACH

1. Supply chain revisions

- Shift to local production in Europe away from India and Asian countries
- Creating a stockpile(s) for emergency planning
- More intensive focus with pharmaceutical companies on the shortage issues and ways to rectify

2. Additional investment in healthcare, but where will money come from?

- Focus will be on resources (physicians, nurses and equipment) and infrastructure (ambulatory vs. acute etc.) and less on medicines
- Building up the resources and infrastructure needed (e.g. budget for training and emergency care vs. meds)

3. Communication and coordination improvements

- Improvements in how hospitals, doctors and patients communicate to track / manage care
- Building on modern technologies like geolocalization (under supervision) to communicate and coordinate in an organized way
- Potential European policies developed for coordination amongst countries

4. Re-evaluate cost containment measures within healthcare

- Cost containment measures may have contributed to current resources issues
- Expectation that these measures will change and there will be an increase in budget allocation
- Evaluate regional disparities, especially in Italy and Spain, and ways to equalize funding and resources
- Greater focus on evaluating avoidable deaths

5. Increasingly tougher pharmaceutical evaluations

- Potential focus on drug evaluations specifically on where drug is produced and supply chain management
- Challenge the actual incremental value a drug brings to the market
- COVID-19 economic crisis may impact market access for high cost / innovative therapies through tougher price negotiations, especially in countries already economically strained

EU Payer PRMA Environment Advisory Board

- MME regularly conducts EU payer advisory boards in order to:
 - Understand impending regulatory and legislative changes and anticipate their potential impact within the country and on others within EU
 - Stay informed about the changing Pricing Reimbursement and Market Access (PRMA) environment
 - Gather market insights that support informed strategic decision-making and product pipeline initiatives

Scope of Work

- Full payer advisory board with the ability to customize sub-sessions (max 3) to your needs at the time
- PowerPoint report monitoring the key trends and insights on PRMA environment as well as your specific feedback
- Multiple sessions focused on specific issues with a personalized design exclusive to your needs



A woman in a dark blue suit is shown from the chest up, her right hand held out palm up. Above her hand, a complex network of white nodes and lines, resembling a neural network or data visualization, glows and extends across the top of the frame. The background is a solid dark blue color.

THANK YOU

MIME

Learn from Our Experience,
Profit from Our Thinking.®