



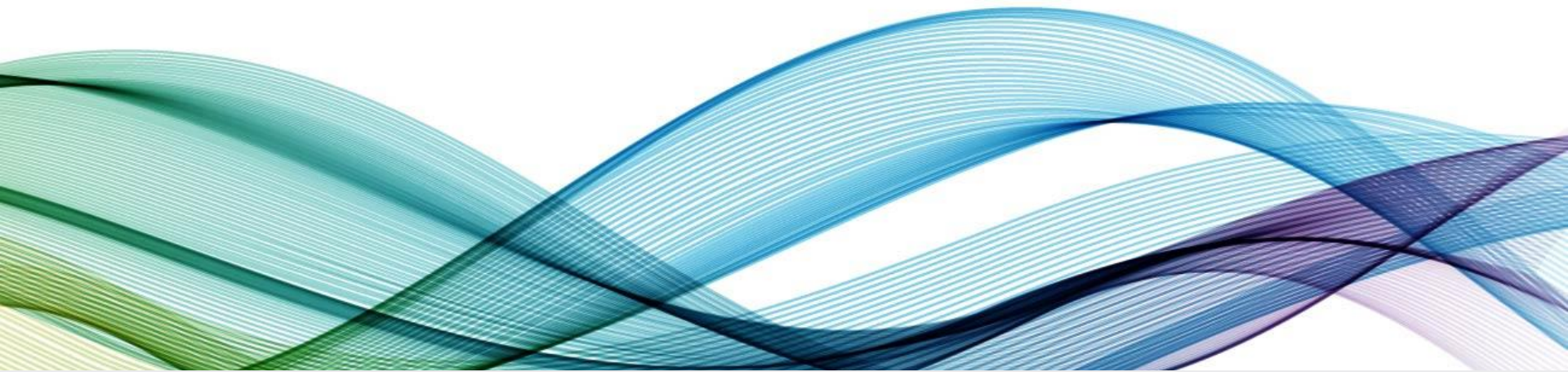
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# **Market Access in Germany**

*understanding the challenges, seeing the chances*

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The healthcare landscape is changing.  
Market access approaches must adapt, as  
they are key to maximizing the rapid uptake of  
new treatments

**Some of the key hurdles:**

Budget pressures  
for healthcare  
systems

Healthcare  
system  
complexity

Global, national  
and local value  
needs

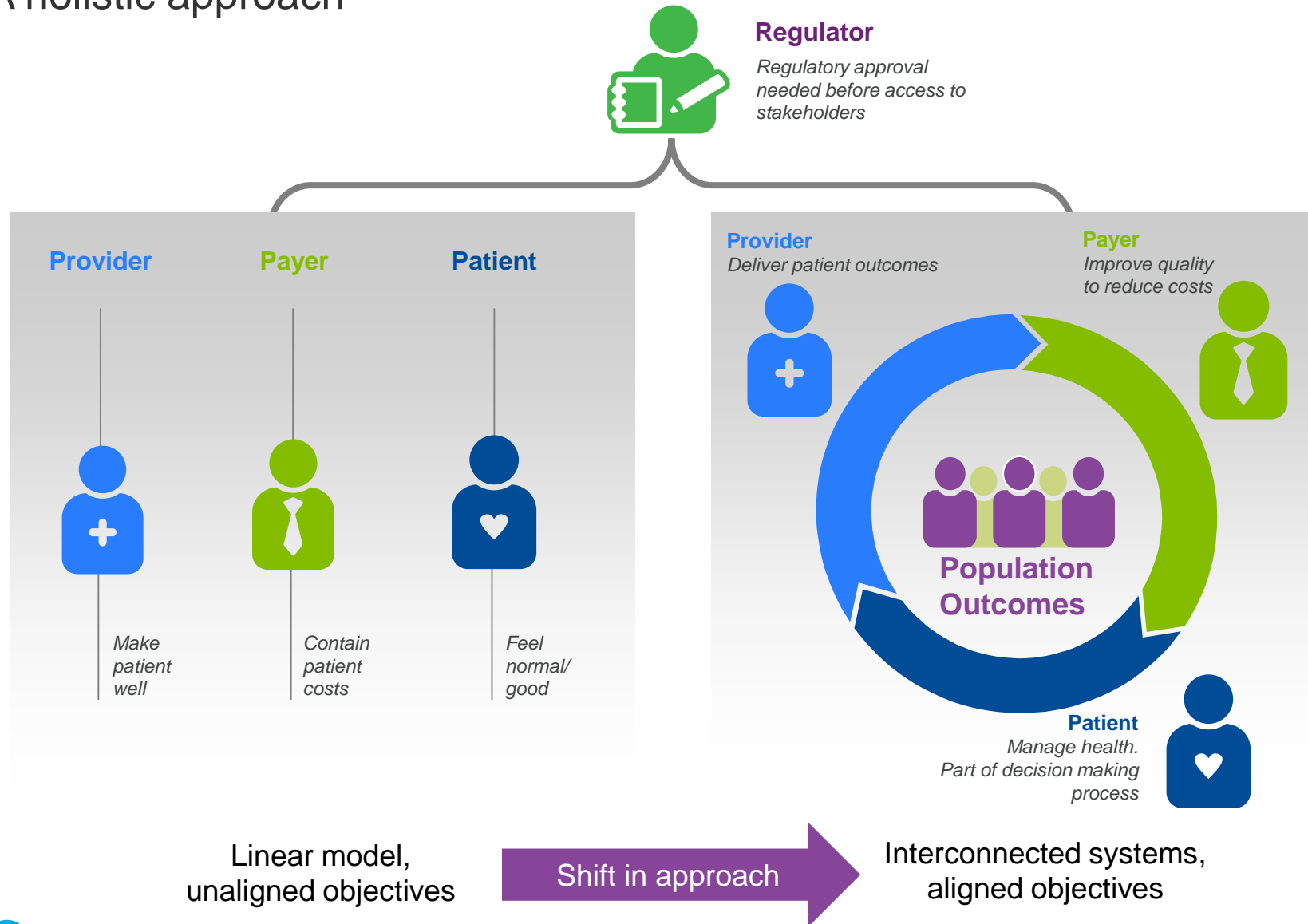
Conditional  
approvals

Adaptation of  
treatment  
pathways

Patient access,  
support and  
adherence

# Interconnecting health systems

A holistic approach



# Overarching principles of market access

Addressing the challenges

## Increasing stakeholders demands



- **Analytic:** Need for increasingly sophisticated evidence
- **Specialist and complex product launches:** Translation to real world
- **Compliance:** Transparency at regional and local level
- **Patient access:** Need to prove added value to stakeholders

## Increasing constraints



## CHALLENGE

*Complexity of building advocacy and access across multiple healthcare stakeholders*

# The impact of not adapting

Getting market access right



**Commercial and clinical impact**



**A mismatched local value story**



**Poor uptake and adherence**



**Patient care is not maximized**

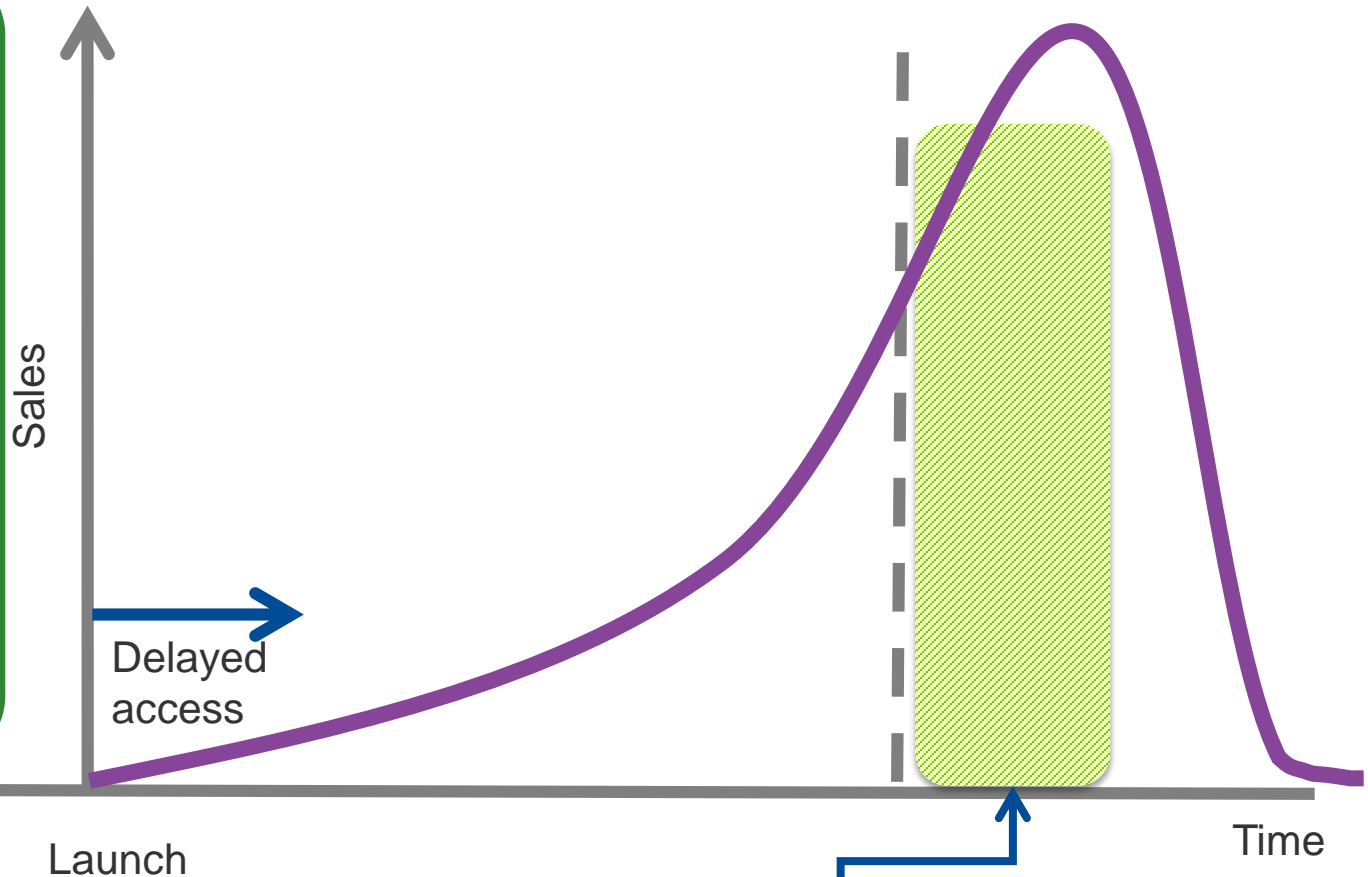


**Not enough collaboration**

# Why getting market access right first time is essential

Implementing a robust market access plan at the earliest point is essential to maximizing:

- Commercial impact
- Stakeholder relationships
- Patient outcomes



**Achieving market access success**  
*across the product life-cycle*

# Key strategies for market access success for all stages of the product life-cycle

## Value

- HTA and pricing & reimbursement submissions
- Robust set of value propositions
- Identifying the unmet medical need

## Access

- Right drug, right patient, right time, right price
- Understand global, national and local stakeholders
- Build effective local relationships

## Outcomes

- Monitoring outcomes
- Real world data
- Patient populations, prescribing patterns and regulations differ globally

## Prescribers

- MSL deployment to link with HCPs
- Translating clinical knowledge into commercial value
- Access to drugs that show clinical and cost effectiveness

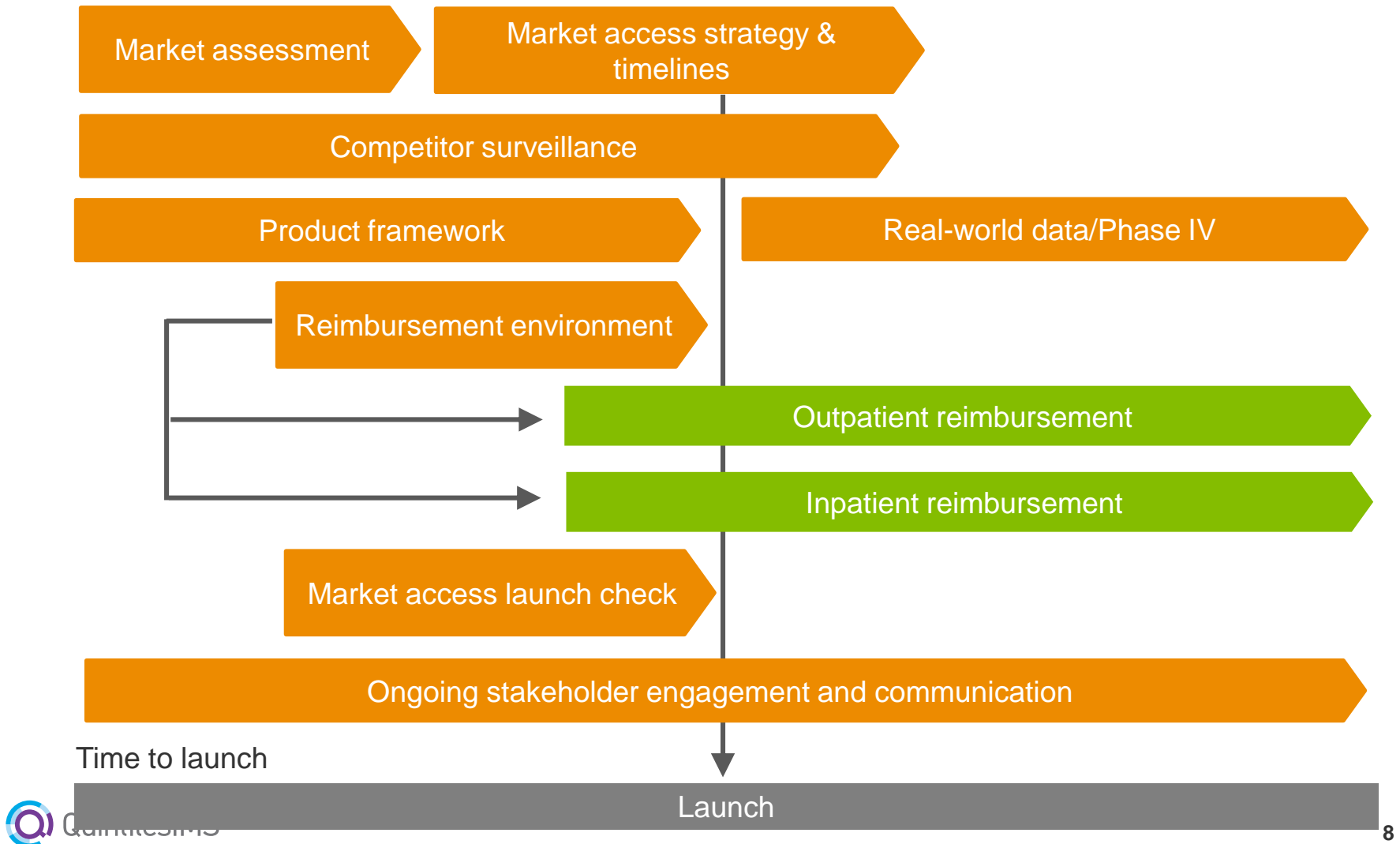
## Patients

- Creating better treatment pathways
- Understanding drug adherence in the real world
- Support for difficult treatments



# Where are you on the product life-cycle?

A solid Market Access Launch Roadmap is crucial to ensure success



# Questions?

# Your contacts

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