

# Market Access Europe: It's Not Just About Price

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## Abstracts

“May you live in interesting times.”

Considered a curse by some, the saying could also be a blessing—especially when it comes to the evolving world of market access in Europe.

Given its complex geo-political situation, position in the global economy and number of voices to be heard, market access in Europe is both an environment of great hurdles—and great potential. While price and cost containment are major factors tackled by administrations and the pharmaceutical industry alike, it is only part of the story.

The rest of the tale is as multi-faceted as the region itself. National reimbursement policies that vary widely from country to country, payer restrictions and health care legislation have created an environment that can no longer focus solely on price. The result is a growing awareness in the industry of the importance of developing strategies that prepare the market, ensure there are no hidden payer issues and which pre-empt stakeholder concerns.

In *Market Access Europe: It's Not Just About Price*, FirstWord casts a critical eye on the rapidly changing European environment to consider the key drivers and barriers to market access. The wide-ranging report addresses all major areas of market access in Europe, from value demonstration and partnership to price reference issues, the importance of communicating value and pan-European versus local approaches. The study includes interviews and access to some of the most senior and well-respected industry figures from PharmaPrice International, Novartis, Janssen and Axon Communications, amongst others. Concisely written, the report offers the industry discussions of major trends, insight into the pros and cons of specific approaches and most importantly of all, a thorough overview of the current state of the environment.

## **Scope**

The report includes:

A full report on every aspect of market access in Europe

Insight into the pros and cons of specific approaches

## **Key features:**

Expert opinion on all major areas of concern in market access in Europe

Detailed discussion of price and cost containment issues with a focus on value demonstration and partnership

Case studies that highlight successful approaches

Overview diagrams and up-to-date statistics to illustrate the scope of changes to the market

Several key academic and industry references for further reading and detail

## Contents

### **EXECUTIVE SUMMARY**

### **THE EVOLUTION OF MARKET ACCESS**

### **WHAT IS MARKET ACCESS?**

### **PHARMACEUTICAL COMPANY ALIGNMENT TO THE EXTERNAL ENVIRONMENT**

### **DEMONSTRATING AND COMMUNICATING VALUE**

### **REGIONAL DIFFERENCES AND CHALLENGES**

Expenditure on pharmaceuticals

Drug utilization

Approaches to price control

Fixed pricing

Cost effectiveness/cost benefit analysis/measurement

Profit caps, rebates and reductions

Reference pricing

### **MARKET ACCESS DYNAMICS**

Patient- versus product-centric approaches to market access

The industry view

Patient and provider view

Pan-European vs. local approaches

Healthcare systems view

Pharmaceutical industry view

### **KEY MARKET ACCESS CHALLENGES AND OPPORTUNITIES**

HTA: the challenges and the future

Efforts to create a European approach to HTA

Most believe that HTA should be driven by national needs

Pricing & reimbursement

Price controls

International reference pricing

- Price interdependencies between countries
- Value Based Pricing: A new level of pricing sophistication
- Therapeutic/internal reference pricing and therapeutic substitution
- Parallel imports
- Risk share schemes
- Disease management
- Where can industry partner?
- Value: Balancing the short term and the long term
- Generic substitution
- Generic-drug companies position in new drug development
- Time for a new partnership model?

## **CRITICAL CONSIDERATIONS FOR APPROACHES TO MARKET ACCESS**

- Societal expectations
- Government policies
- Patient engagement
- Payer engagement
- Prescriber engagement
- Long term partnerships between healthcare providers and industry are the way forward

## **CHALLENGES FOR INDUSTRY AND GOVERNMENTS**

- Continued innovation
- Generic erosion of brands, new generics biosimilars

## **THE NEED FOR AN HOLISTIC APPROACH BY THE PHARMACEUTICAL INDUSTRY**

## **LOOKING AHEAD: LINKING PRICE AND VALUE THROUGH PARTNERSHIP AND OUTCOMES**

- Partnership
- Value based pricing methodologies
- Patient-reported outcomes?demonstrating value well beyond price

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