# Monitor Deloite.

### PROSPECTIVE RISKS

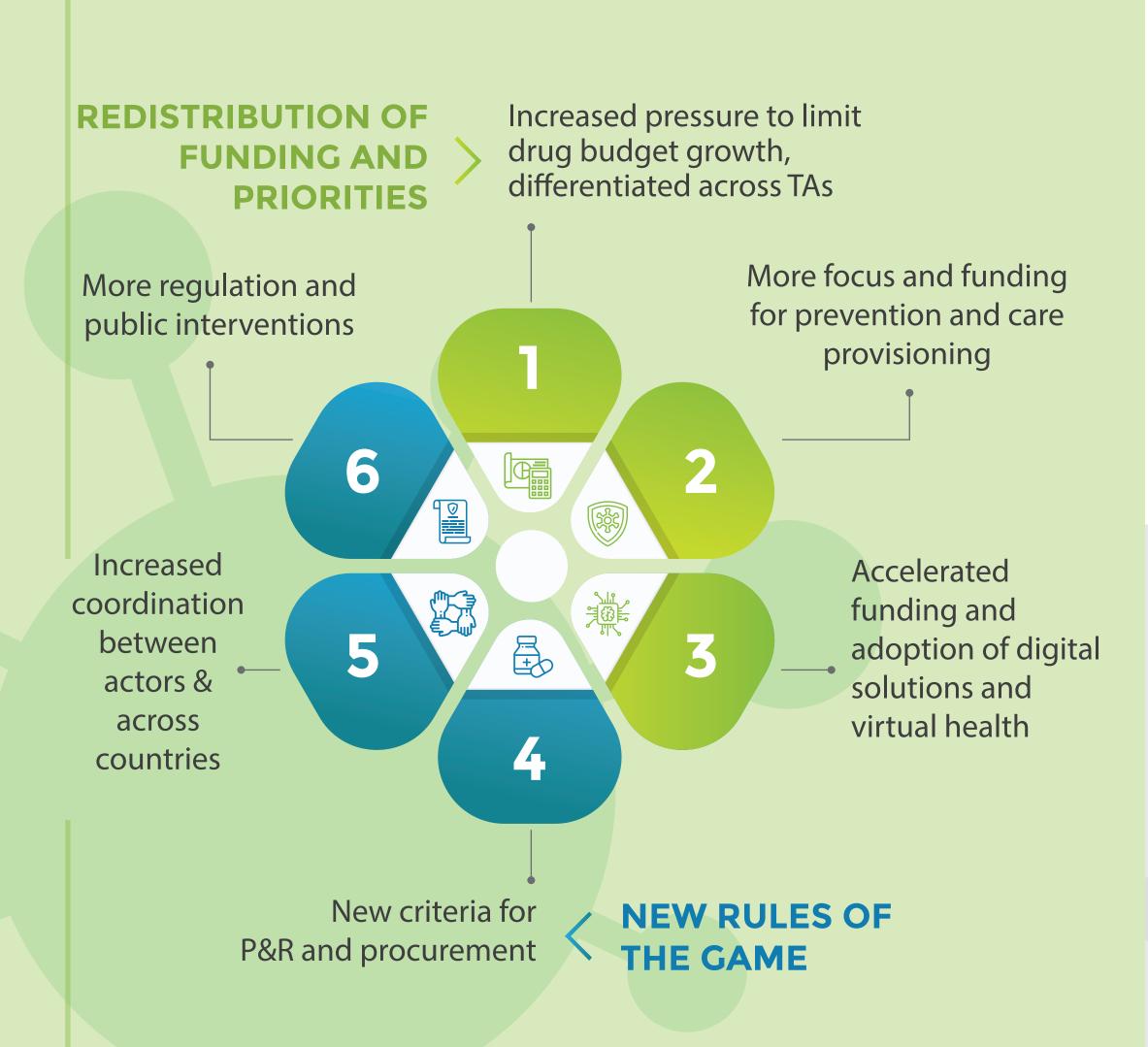
TODAY, we already observe the immediate impact of COVID-19 on Market Access

### Especially:

- Delays in drug assessments
- Reprioritization of drug assessments



TOMORROW, we need to anticipate six potential evolutions driven by COVID-19

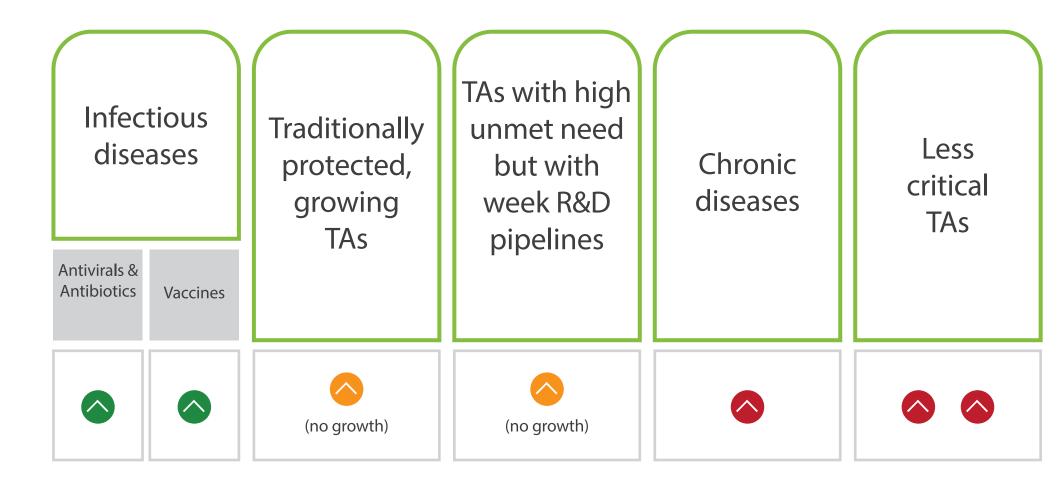


# IMPLICATIONS OF COVID-19 ON MARKET ACCESS & PRICING

# REDISTRIBUTION OF FUNDING AND PRIORITIES



### Increased pressure to limit drug budget growth, differentiated across TAs



More regulation

and public interventions

**REGULATION OF** 

NATIONALIZATION /

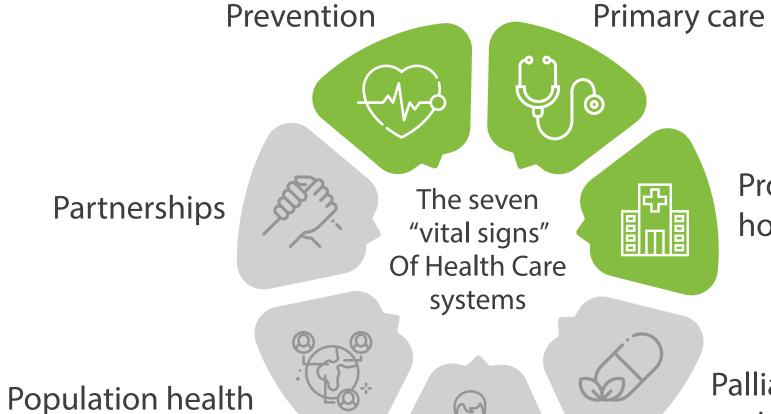
**COMPULSORY LICENSING** 

**PRICES** 

# 2

# More focus and funding for prevention and care provisioning

Where will the focus be?



management

Productivity in hospitals

Palliative and

end-of-life care

Patient engagement

# Accelerated funding and adoption of digital solutions and virtual health



frameworks for digital solutions

Eased access and price negotiations for digital solutions and virtual health

### NEW RULES OF THE GAME

Increased coordination

between actors & across countries

and empowerment





Increased coordination across types of actors and

geographies on R&D

P. Co.

intervention

Regulatory

and Access

frameworks

negotiations

Access

### Drug availability

**New criteria for P&R** 

and procurement

Favorable conditions for \( \text{\text{Companies}} \) with a history of and mechanisms in place to guarantee stock reliability

### **National preference**

favorable conditions for national / regional supply chain and manufacturing

### Public health/ population value

Demonstrated drug impact beyond the individual health, considering public health value and impact on the Health Care systems

### MARKET ACCESS AND PRICING EXECUTIVES NEED TO ANTICIPATE THESE EVOLUTIONS



**GOVERNMENT** 

RELOCALISATION

**EXPECTED** 

**EVOLUTIONS** 

DRIVEN STOCK-PILING

Payer engagement materials and messaging (Payer value Proposition, Objection handlers, ...)

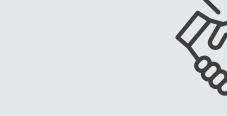




**PROSPECTIVE** 

RISKS

**Pricing, Contracting** and Payer services



Payer / stakeholder engagement plan



Coordination
with other functions
(R&D, Mnfg, Supply Chain,
eHealth, CSR)

