



Reframing the Challenges of Access and ROI



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Pharma companies today are being judged not just on their profitability for shareholders, but also on the extent to which their products are accessible to patients. Today's Environmental, Social and Governance (ESG) investors want to see evidence of corporate responsibility, for which pharmaceuticals' surrogate measure is access. While companies such as Novo Nordisk and UCB explicitly include access or related measures as direct performance indicators, eight of the top 20 companies are developing systematic access plans. GSK and Novartis have made specific quantitative commitments to increasing access to their products by 2025.

While access has always been of interest as a metric, companies have been discouraged by the trade-off between ROI and access. However, for sustainability, companies should target maximum return, not ROI as a percentage. In many cases, the highest returns depend on increasing access even if ROI is diluted.

We need to frame the problem differently. Historically, companies have worked through a standard process of defining the epidemiology and patient pool, pricing, target segments that can afford the price, share and positioning. This algorithm fails to include the effect of company initiatives to increase access – a different frame. Patient Access Programs (PAPs) should not be considered after the fact but as a fundamental part of strategy. Financial support



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solutions involving partners from banks and insurers, volume-based discounts, services and device/ diagnostic bundles are all ways of increasing the ability to pay. Crowdfunding may be an option, especially for high-priced conditions such as rare diseases.

Key Questions to Ask

Perhaps a different process to follow might be to ask these questions:

- 1** Have we done all that we can to ensure our product is useful and relevant to reducing the disease burden?
- 2** Do we fully understand how we can address barriers and needs at all stages of the patient journey?
- 3** Have we thought through all the stakeholders and constituents in the ecosystem and their needs and influence?
- 4** Have we considered non-price-related access barriers?
- 5** Have we made the trade-offs explicit in different access/ROI scenarios and alternatives?



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The changes to pharma's world view overlap that of other industries: It is no coincidence that the idea of ecosystems is replacing customers in many industries. This systems perspective looks to understand the participation of multiple potential partners in the product/service as well as multiple stakeholders on the user side. Some industries, such as automotive and electronics, are more advanced in their thinking and can offer ideas relevant to healthcare.

As well as analogs from other industries, a broader frame includes the full range of potential partners for finance, ancillary services and distribution, as well as the set of stakeholders in and around the patient, or the "patient cluster." Digital and data collections have become sufficiently important to be broken out on their own.

Such a frame then permits redefinition of the "product" to integrate more value and relevance, reducing the disease burden and attracting payer support, as well as innovative segmenting around needs to refine the ecosystem to support different groups with different product/service configurations.

Our clients are recognizing this need in all global markets but especially in non- or less-reimbursed countries, where access is an especially pressing issue. Moving to a new frame can be a win/win for pharma companies, payers and governments.

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