

Reflecting on key developments in Market Access in Ireland during 2019

DATA IN HEALTHCARE

The importance of data has become a staple argument in the current discourse surrounding the future of healthcare. With market access and reimbursement currently shifting towards more advanced treatments and novel pricing arrangements, improved data systems to track and treat patients are crucial for success. Digital healthcare held a central role at many events in 2019 such as ISPOR Europe and IPHA Innovate for Life conferences. Whether through big data, data interoperability or novel e-health tools, data will undoubtedly continue to shape the discussions around healthcare and market access in 2020.

PATIENT PERSPECTIVE

The patient perspective in reimbursement has taken a central role this year. With the increasing number of treatments for rare diseases seeking reimbursement in Ireland, the patient perspective has become crucial to understanding the true value of these products. While patients and patient organisations have the opportunity to contribute to reimbursement decisions in Ireland through the NCPE's Patient Organisation Submission Process, there is still uncertainty surrounding how these contributions are valued and utilised.

AXIS' research on the patient perspective and experience of the HTA system in Ireland has shed further light on the methods by which patients can be further integrated into the reimbursement process.

BREXIT

The uncertainty surrounding Brexit has been an overarching theme of 2019. With the threat of a no-deal agreement ever present, there has been a crucial need for effective planning by both the government and pharmaceutical companies. This has led to substantial cooperation between pharmaceutical companies and state bodies in planning to mitigate the potential issues that may arise from an uncertain Brexit and ensure continuity of medicines supply to patients. These plans and the new market landscape that will result from Britain's departure from the European Union will be touched upon at AXIS' London and Dublin masterclasses in March 2020.

CANNABIS

2019 marked the introduction of the Medical Cannabis Access Programme in Ireland. This 5-year pilot scheme will facilitate the introduction and reimbursement of novel cannabis-based treatments that have the potential to provide substantial benefit to patients suffering from diseases such as epilepsy, multiple sclerosis and cancer. The NCPE are currently assessing the first cannabis-based treatment since the introduction of this programme, and 2020 will hopefully see the assessment of more cannabis-based products.

ADVANCED THERAPY MEDICINAL PRODUCTS

In 2019, the NCPE conducted its first assessment of an advanced therapy medicinal product (ATMP). This treatment was tisagenlecleucel; a CAR T-Cell therapy indicated for patients suffering from refractory large B-cell lymphoma and B-cell acute lymphoblastic leukaemia. The NCPE assessment report highlighted some important challenges associated with this treatment which are recurring themes with this class of product; notably, the lack of robust clinical data and the substantial budget impact of the treatment. As more ATMPs are assessed by the NCPE, and these issues continue to occur, it may pave the way for a more innovative approach to assessing the value of these revolutionary treatments.

2019

Looking forward to 2020.....

2020 will be an important year in market access in Ireland. With the expiration of the IPHA framework agreement on the supply of medicines approaching, negotiations will begin on a new agreement that can build upon the success of the last 4 years, with the 2016 agreement resulting in hundreds of millions in savings for the HSE.

Furthermore, a key focus in 2020 will be on utilising creative approaches to address the challenges posed to payers by high-cost technologies where phase 3 data may not be available. Both the HSE and industry must work together to identify and implement new innovative reimbursement mechanisms going forward. The team here at AXIS look forward to leading and collaborating in this space throughout 2020.

Happy Christmas to all our clients from AXIS Consulting

MARKET ACCESS MASTERCLASS Dublin & London

AXIS is holding a Market Access Masterclass in Dublin and London, on March 5th and 12th 2020 respectively. This masterclass will focus on reimbursement in Ireland post BREXIT. Our experienced staff and guest speakers will provide expert insights on all aspects of the reimbursement process in Ireland. For more information and to book your place on one of the masterclasses please consult our website: <https://axisconsulting.ie/>

Thursday, March 5th, 2020

City Centre location - To be confirmed

DUBLIN

Thursday, March 12th, 2020

Goodenough College, 23 Mecklenburgh Square

LONDON

AXIS Healthcare Consulting Ltd.

19-22 Lower Baggot Street,
 Dublin 2, D02 X658,
 Ireland

Tel: +353 (0)1 223 3233

Email: admin@axisconsulting.ie

www.axishealthcareconsulting.com