



UPHARMA  
Consulting healthcare

SERVICES BROCHURE

**MARKET ACCESS**

**SERVICES FOR  
LIFE SCIENCES**

**(CIS & Central Asia)**

MARKET ACCESS SERVICES PRESENTATION

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# UPHARMA CONSULTING

## Brief introduction

**MISSION: WE FIND  
SYNERGY IN HEALTHCARE**

### About us:

UPharma Consulting is a professional corporate consultancy focused on Health Care, Pharma & MedTech companies. With the HQ in Kyiv (Ukraine) we cover CEE, CIS and Central Asian region.

We analyze pharmaceutical & MedTech markets and healthcare industries, plan launching new products, recruit pharmaceutical business professionals and support investment decisions across the CIS and Central Asian region.

### Geography we cover:

Eastern Europe/CIS, Central Asia, Caucasus

### Whom we work with:

- ▷ Pharma, MedTech, Healthcare companies: Manufacturers, wholesalers, retailers, HC institutions & providers, HCPs, patients, payors
- ▷ Consulting, Marketing, Investing companies: Specialized consultancies and advisories, investing organizations, funds, PEFs
- ▷ NGOs & PAGs: Local and international non-profit organizations, patients' organizations

### Services we provide:

- ▷ **Market Access** ▷ Stakeholders mapping, Market access timeline planning, Market assessment and entry planning, HEOR/ Pricing and Reimbursement
- ▷ **Consulting** ▷ Commercial & Marketing due diligence, Business intelligence, M&A deals support
- ▷ **Recruitment & Organizational Development** ▷ Recruitment & executive search, Talent mapping, Organizational development, Ad-hoc HR support
- ▷ **Industry Reports** ▷ Country reports, Pharmaceutical & Healthcare market reports, ad hoc reports
- ▷ **Training** ▷ Workshops & wargames, modular and ad hoc training programs for S&M, Finance, HR

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# REGION SUMMARY

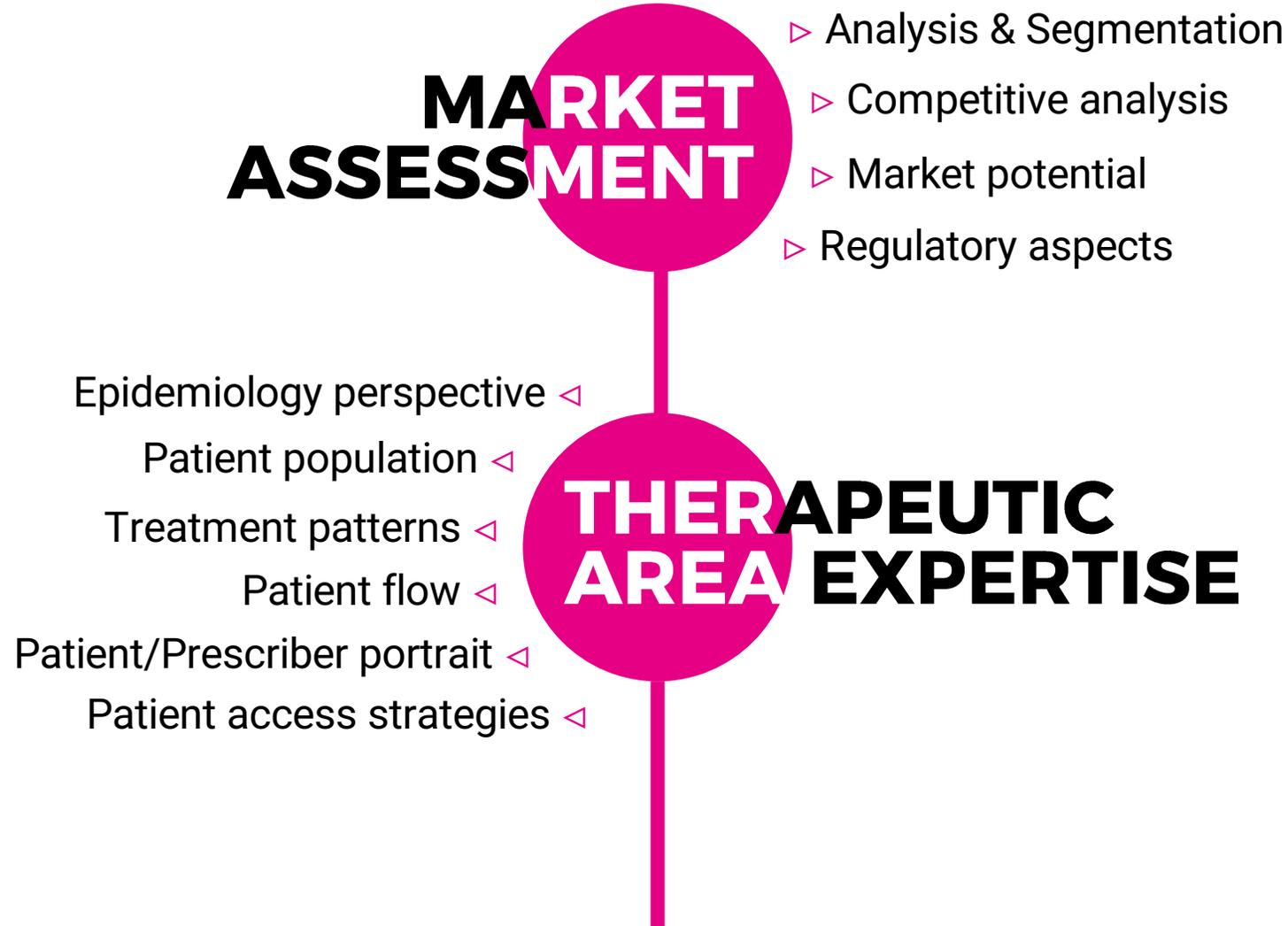
## Key characteristics

- ▶ The region we are working in – CIS/CEE/CA – is a group of dissimilar and diverse life sciences business environments, each of which accumulates a set of established consumption, regulation, advocacy and communication behavior patterns.
- ▶ In terms of pharma consumption, traditionally, the Baltic States and EE's Poland\* have the most developed pharma markets in the region, which are regulated by the EU/EMA rules.
- ▶ The most notable changes in the region are observed in Ukraine, where its healthcare system is being changed drastically moving away from the old-styled Semashko system.
- ▶ Central Asian markets have enormous potential in terms of pharma consumption per capita but are being manually handled by the authoritarian governments with the highest level of associated risks for businesses.
- ▶ **The key feature for all markets** – high demand for lots of modern pharmaceutical and medical technologies, which have a very limited penetration across all the countries.

Region	Country	Population <sup>1)</sup> (people, mio)	Pharma Market <sup>2)</sup> (USD bn)	Pharma Market per capita <sup>2)</sup> (USD)	# of pharmacies
CENTRAL ASIA	 Russia	144.0	17.175	119.3	65 643
	 Uzbekistan	32.7	0.920	28.2	6 000
	 Kazakhstan	18.5	1.311	71.0	
	 Tajikistan	9.1	0.149	16.4	1 780
	 Kyrgyzstan	6.5	0.153	23.9	2 500
	 Mongolia	3.1	0.089	28.5	1 277
<b>Sub-region total/ average</b>		<b>213.7</b>	<b>19.796</b>	<b>47.9</b>	<b>77 200</b>
EASTERN EUROPE	 Ukraine	42.6	3.660	85.8	20 620
	 Poland	38.0	8.113	213.6	14 200
	 Belarus	9.5	0.909	96.1	3 619
	 Moldova	3.5	0.166	46.9	1 168
<b>Sub-region total/ average</b>		<b>93.6</b>	<b>12.848</b>	<b>110.6</b>	<b>39 607</b>
CAU- CASUS	 Azerbaijan	9.9	0.387	38.9	2 285
	 Georgia	3.7	0.239	64.4	2 400
	 Armenia	3.0	0.153	51.2	1 702
<b>Sub-region total/ average</b>		<b>16.6</b>	<b>0.779</b>	<b>51.5</b>	<b>6 387</b>
BALTIC STATES	 Lithuania	2.8	0.893	320.9	1 343
	 Latvia	1.9	0.745	383.0	871
	 Estonia	1.3	0.435	330.1	494
<b>Sub-region total/ average</b>		<b>6.0</b>	<b>2.072</b>	<b>344.7</b>	<b>2 708</b>
<b>REGION TOTAL/ AVERAGE</b>		<b>330.0</b>	<b>35.495</b>	<b>138.7</b>	<b>125 902</b>

Sources: 1) IMF (dataset: Apr 2019), 2) 2018; UPharma Consulting. NOTES: eop – end of period; \* Polish pharmaceutical market is the only pharmerging market in the region.

# MARKET ACCESS SERVICES



## MARKET ASSESSMENT

- ▷ Analysis & Segmentation
- ▷ Competitive analysis
- ▷ Market potential
- ▷ Regulatory aspects

## THERAPEUTIC AREA EXPERTISE

- Epidemiology perspective ◀
- Patient population ◀
- Treatment patterns ◀
- Patient flow ◀
- Patient/Prescriber portrait ◀
- Patient access strategies ◀

# PAYER'S PERSPECTIVE ASSESSMENT

- ▷ Local payer research
- ▷ Targeted qualitative primary researches with payers
- ▷ Willingness to pay
- ▷ Pricing scenarios

# MARKET ACCESS STRATEGIC PLAN DEVELOPMENT

- Business Modelling ◁
- Mapping targeted stakeholders ◁
- Patient Access Strategy and Mapping ◁

# VALUE DOSSIER

- ▷ Product value review
- ▷ Communication with HTA/ regulatory authorities
- ▷ Value proposition

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# MARKET ASSESSMENT

## Market Access Services



### Market analysis and segmentation:

Comprehensive analysis of market sectors with qualitative and semi quantitative research. Identifying insights on customers, HCPs, KOLs, patients with all-round segmentation.

### Market potential identification:

Assessing the market size and market share among key stakeholders. Finding out weaknesses and opportunities for the given product within a strictly outlined target market.

### Competitive analysis:

Finding out exact competitors for the chosen product or technology, identifying their pricing segments, market strategies and promotional activities by segments.

### Regulatory environment analysis:

Scanning and classifying the regulatory environment basis for the given product/technology. Analyzing possible future changes by regulators and public bodies.



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# THERAPEUTIC AREAS EXPERTISE

## Market Access Services

### Treatment patterns analysis

Surveys among prescribers to get the picture of the real-world treatment schemes alongside with the formulary and clinical protocol analysis

### Epidemiology perspective/ patient population

Implications on epidemiological issues, burden of disease and access of certain medicines to patients. Cooperation with state and NGO sectors to obtain the unbiased information on patient population

### Patient flow

Representation of patient flow in the healthcare system with detailed routs and prescribing techniques

### Patient access strategy

Planning and strategic evaluation of possible ways to reach the patient population

### Patient/ Prescriber portrait

Conducting the complete profile of patients and prescribers in a given therapeutic area with the use of qualitative surveys



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# PAYER'S PERSPECTIVE ASSESSMENT

**Market  
Access  
Services**

## Local Payer Research

Evaluation of funding systems  
in the healthcare across the  
region with the key accent on  
payers and their capabilities

## Targeted qualitative primary research

Direct assessment of  
payer's perspective  
through interviewing

## Willingness to pay surveys

Conducting an unbiased research of patients  
and PAGs. Identification of key product  
values that induce patient's willingness to  
pay for a given product.

## Optimal pricing scenarios

Basing on payer's assessment and market specifics (logistics  
and distribution issues), UPharma Consulting team help clients  
with pricing and expenditure planning



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# MA STRATEGIC PLAN DEVELOPMENT

## Market Access Services

- ▶ Building up a customized and adapted market entry strategy per each country in the region.
- ▶ Forming a timeline of a market entry.
- ▶ Planning market entry activities.
- ▶ Budgeting the market entry process.

### Stakeholder mapping

Detailed and validated schemes that represent stakeholders in a given sphere in pharmaceutical markets in CIS countries

### Key decision makers implication

Direct targeting of institutions and officials, engaged in the decision-making process, that regards market entry, registration, distribution and promotion of pharmaceutical products in CIS countries

### Communication with payers, HCPs and KOLs

Establishing of working relationships with targeted KOLs and payers, on the basis of free market and evidence-based medicine principles

### Patient access lobbying

Active relationships with patient communities and advocacy groups, negotiations and support in lobbying. It may regard both registration of a medical product on patients' demand and promotion of an available medicine in the markets of CIS countries



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# VALUE DOSSIER

## Market Access Services

### Communication with state HTA agencies/ regulatory authorities

Building-up a working network with stakeholders involved in market access issues across the region. Both state agencies and commercial companies can be involved into a product value delivery.

### Product value review

Complete summary of clinical, economic and social value of a product, with the use of available data on clinical and health economics research.



### Preparation for State Formulary/ Essential drugs list submission

Preparation of a whole set of documents and data, required by national Formulary and EDL committees across the region. Analysis of targeted stakeholders and procedures.

### Value Proposition

Adopted document with a set of prior values for further negotiations with state HTA and/or Regulatory authorities across the region.

# MARKET ACCESS PRACTICE LEADERS



**Jonas TRYGGVASON**

## Roles

- ▷ **Chairman of Board**, UPharma Consulting
- ▷ **Associate Trainer**, Center for Creative Leadership
- ▷ **Senior Associate**, Management Center Europe (MCE-AMA)
- ▷ **Executive Vice President (CEE)**, Actavis Group

## Education

- ▷ International Business, **University of Washington**,
- ▷ Computer Science, **University of Iceland** and earned a Master from the **State Institute of Physical Education** in Moscow.
- ▷ Master in International Relations from the **University of Kent, BSIS**, Brussels.

## Professional experience

Jonas is a seasoned executive of the pharmaceutical industry, with in-depth Know-How and expertise at C-level in sales, marketing, business development, distribution, manufacturing, regulatory affairs, national, regional and private tenders as well as M&A activities of pharma companies.

He has a deep understanding of the needs and requirements of different market archetypes and has dealt extensively with public institutions to ensure market access.

## Latest projects

- ▷ Analysis of Investment and Business plans during the Commercial Due Diligence of a major BGx manufacturer.
- ▷ Launch Excellence for Marketing series of Workshops for a global BGx company.
- ▷ Series of Innovation and Portfolio Expansion workshops for a global BGx company.
- ▷ Pre-investment audit of commercial and marketing capacities of a BGx manufacturer.

## Professional experience

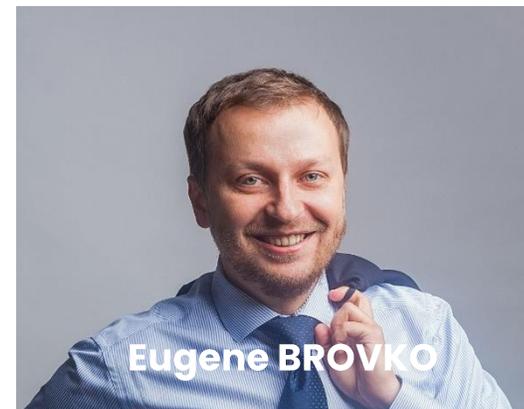
Eugene has been working in the Pharma Industry in the CIS/Central Asian region for 8+ years in Market Access, Market Research and Business Development areas.

He has an extensive experience in consulting pharmaceutical companies, advisories, private equity funds and other stakeholders on Market Access issues.

Consulting partner and practice leader in Marketing Strategy, Market Access and Insights.

## Latest projects

- ▷ Analysis of the Investment and Business Plan of a leading pharmaceutical manufacturer within the Commercial Due Diligence assessment.
- ▷ Opportunity assessment of a recently acquired BGx portfolio in the CIS/Central Asian region.
- ▷ Market Access strategy development for an EU-based manufacturer of pharma and para-pharmaceutical products.
- ▷ Market Access planning and strategy development to enter the CIS for a US-based biopharmaceutical manufacturer.



**Eugene BROVKO**

## Roles

- ▷ **Founder, Partner**, UPharma Consulting
- ▷ **Consultant**, UPharma Consulting

## Education

- ▷ CIM Certificate in Strategic Marketing (L6) (UK, **Chartered Institute of Marketing**)
- ▷ MA, International Economy, **National Aviation University**, Kyiv (Ukraine)

# RECENT PROJECTS

## Project: Commercial due diligence

**Client:** pan-European investment bank

**Target:** Leading Gx/BGx pharmaceutical manufacturer

**Aim:** To assess the risks of participating in the Project from a commercial perspective, by providing an independent opinion.

## Project: Pre-investment marketing & sales audit

**Client:** Private equity fund

**Target:** Major local biopharmaceutical company

**Aim:** An in-depth snapshot of a target's commercial, marketing, and operational environment to understand its sustainability to maintain the investment.

## Project: Specialty psychiatry market entry strategy development

**Client:** EU-based advisory firm/ biopharmaceutical manufacturer

**Target:** Specialty psychiatry market in one of the CIS countries

**Aim:** To assess current market entry procedure, identify possible risks and opportunities, specify first steps in accessing the market.

## Project: Pre-investment commercial audit

**Client:** European investment bank

**Target:** Major pharmaceutical manufacturer in Ukraine

**Aim:** Complex marketing and commercial audit of company's capacities, investment and business plan, analysis of export sales opportunities.

## Project: Market entry feasibility study

**Client:** EU-based pharmaceutical manufacturer

**Target:** Ukrainian pharmaceutical market

**Aim:** To develop a market entry business model, identify resources needed and develop an entry strategy.

## Project: Analysis of the hematology drugs market

**Client:** Rare diseases biopharmaceutical company.

**Target:** Company's marketing strategy.

**Aim:** To identify current market size, possible risks on entering a rival product, understand physicians' attitude to a company's product.

## Project: Analysis of a prescribing landscape

**Client:** Biopharmaceutical manufacturer

**Target:** Specialty psychiatry market in one of the CIS countries

**Aim:** Analysis of product prescription process, market influencers and a possible impact on a company's commercial model.

## Project: Opportunity assessment of a new portfolio

**Client:** Big-pharma company

**Target:** Recently acquired portfolio of BGx products for the CIS/ Central Asia

**Aim:** To analyze the market opportunity and identify possible added value in overlapping with existing products.

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# CLIENTS & PARTNERS

Shire

Abbott

GEDEON RICHTER LTD.

Getz  
pharma

polpharma

Alembic  
Touching Lives over 100 years

АЛКАЛОИД  
СКОПЈЕ

Arthur D Little

FERRING  
PHARMACEUTICALS

varian

Baxalta

bf BIOFARMA

ФАРМАЦЕВТИЧЕСКАЯ ФИРМА  
Дарница

EGIS

Фармак

gsk  
GlaxoSmithKline

pharmaniaga

RECORDATI

Roche

European Bank  
for Reconstruction and Development

... and others

LET'S BE IN TOUCH!

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