

White Paper

Market Access Outlook Report, Autumn 2022

*Evaluating the UK health policy and market
access landscape*



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Foreword

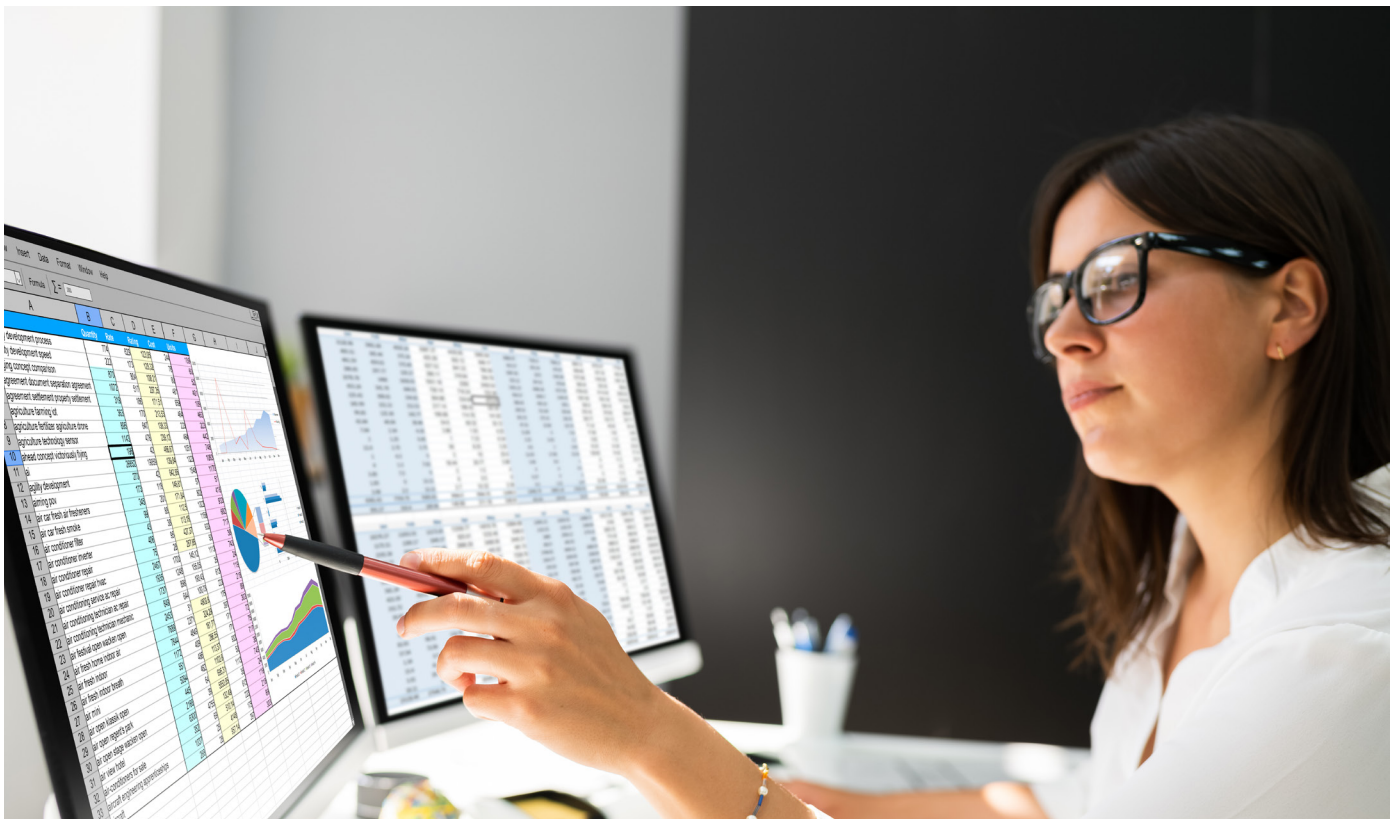
It is impossible to look ahead to the future of market access in the UK without first considering the shadow of the extraordinary events of the very recent past.

The COVID-19 pandemic continues to have an unprecedented impact on the UK healthcare services. However, both the Government and the NHS have learned a vast amount from the pandemic and health services across the UK continue to transform faster than ever before to meet patient needs. Above all, the pandemic illustrated the value of collaborative working between the NHS and Industry, achieving progress in many areas of the [Long-Term Plan](#)¹.

The Government's aim to harness this key learning informed the [NHS Integrated Care Systems: design framework](#)² as well as the [Health and Social Care Act](#)³, which provided Integrated Care Systems (ICSs), with a statutory footing, representing the biggest NHS reform for over a decade.

Launching the [Innovative Licensing and Access Pathway \(ILAP\)](#)⁴ and joining international regulatory collaboratives, [Project Orbis](#) and the [Access Consortium](#)⁵, provided a gateway for innovative medicines to be launched in the UK medicines market quickly through accelerated regulatory approval.

These initiatives represent a signal to industry that the life sciences remain a key focus for the UK post-Brexit.





What problem are you solving?

On the 31st March 2022, the Government published a revised version of its [mandate](#) to the NHS.

The core objectives of the mandate remain broadly similar to the mandate published in March 2021 — to respond to Covid-19, to transform services in line with the Long-Term Plan, and to focus on prevention of ill health and digital transformation. However, against a backdrop of a rising tide of challenges, it seems that delivering these objectives will be extremely difficult for the NHS to achieve.

For Life Science organisations, however, it is these very challenges that provide the key to demonstrating the value new technologies bring in support of the NHS.

The overwhelming market access challenge for life sciences is now the need to provide more evidence that their prospective products are solving the unmet need in their relevant patient groups. Those companies that can communicate the value their products bring to health system are those most likely to win the increasingly scarce ear of NHS decision-makers.



National plans, locally delivered

The Health and Care Act is the most significant healthcare legislation in a decade. The Act not only builds upon the aims of the NHS Long-Term Plan, it also marks an important step in the Government's ambitious and growing health and care agenda. Together, the [Levelling Up and Regeneration Bill](#)⁶, the [Health and Social Care Integration White Paper](#)⁷, the [People at the Heart of Care White Paper](#)⁸, and the in development [10-year Cancer Plan](#)⁹ set out the aim to deliver “right care in the right place at the right time”, an aim supported by £36Bn in funding over the next three years through the [Health and Care Levy](#)¹⁰.

ICSs, responsible for delivering and tailoring healthcare services to the needs of their local populations, will be key to implementing this agenda.

ICS priorities are expected to be published by December and the remainder of 2022 will bring some clarity to how ‘ready’ ICSs are to deliver the ambitions of the national health agenda.

For Industry, there remains significant uncertainty as to how ICSs will impact day-to-day business and companies will need to be prepared to focus on a multi-layered, system level engagement when bringing products to market. Companies will need to align their priorities with those of ICSs, to work towards addressing the healthcare needs of local populations.



Sustainable healthcare

[Delivering a “Net Zero” National Health Service](#)¹¹ committed the UK to reaching an environmentally sustainable health service by 2045, with significant milestone targets from 2028 onwards. The report highlighted the considerable advances the NHS, currently responsible for 4% of the nation's carbon emissions, has already made in reducing the environmental impact of its services, but acknowledges that more is needed.

Medicines account for 25% of NHS emissions and the NHS Long Term Plan sets targets to deliver significant and accelerated reductions in the total emissions from the NHS including the use of lower carbon inhalers, such as dry powder inhalers (DPIs). The most used inhaler in the UK has a carbon footprint of 28kg CO₂e per inhaler. That's the same carbon footprint as driving from Manchester to Newport in South Wales.

Although the NHS carbon targets are a long-range goal, the impact of these can already be seen in ‘sustainability clauses’ in government tenders. The expectation of industry support for carbon-neutrality, through enhanced manufacturing and supply chain processes, ‘green’ packaging solutions, and sustainable, safe, waste disposal, will only grow in coming years.



Innovative integration

The [Innovative Medicines Fund](#)¹² (IMF) is a policy with the potential to improve access for medicines facing data generation and cost-effectiveness challenges.

The IMF will operate alongside, and shares many principles with, the Cancer Drugs Fund (CDF). A funding allocation of £340m per annum will contribute to a combined total of £680m of ringfenced NHS England funding that aims to provide early access to the most promising medicines for both cancer and non-cancer patients. The IMF therefore offers the potential for treatments for non-cancer diseases (including rare and orphan), to benefit from the supported access already available to cancer therapies.

However, alignment between other initiatives, such as the ILAP and the updated NICE methods & processes manuals, will be needed. Many observers will be keeping a close eye on how the IMF integrates with and supports multi-agency working in an evolving national approach to real world evidence generation.



'Suitable and ready'

In May 2022, NHS England published its [Roadmap for integrating specialised services within Integrated Care Systems](#)¹³, which outlines how the commissioning model for specialised services will develop with some commissioning responsibility devolved to local ICSs.

While oversight of specialised services will be retained by NHS England, from April 2023 65 services deemed "suitable and ready" for greater ICS leadership will be commissioned locally to maximise the opportunity for joined up and equal care for patients. Specialised services set to devolve to ICS commissioning include Chemotherapy, Renal Dialysis and many specialist surgical and paediatric services.

106 services, however, have been deemed to be either not suitable or not yet ready for greater ICS leadership. A final list of specialised services to be commissioned by ICSs is expected to be published later this year, when the readiness of ICSs to commission these services will be assessed against a pre-delegation assessment framework (PDAF). Where ICSs are not yet ready to take on full delegated responsibility, further development support will be provided through formal joint commissioning arrangements between NHS England and NHS Improvement and ICSs by establishing statutory joint committees from April 2023.

For industry, this change adds further complexity to an uncertain and complicated market access landscape. The impact of these changes on stakeholder engagement and NHS partnership must be considered industry-wide when bringing a product to market.



Are you ready?

As we look towards the end of 2022 and into 2023, we can expect the Government and NHS England to continue to work towards meeting the aims and objectives outlined in the 2022-23 Mandate.

Due to the differing maturity levels of each ICS, we can expect many ICSs to continue to develop throughout the rest of the year and beyond.

The Government will also continue to work to ensure the UK becomes a global leader in science and innovation. A review of the Life Sciences Vision:

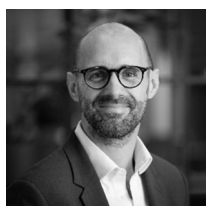
One Year on is expected to be published imminently. The paper will review the steps the UK has made in science and innovation to meet the aims and objectives outlined in the Life Science Vision, as well as provide new aims and objectives for Industry to consider. Policies such as the 10-year Cancer Plan (expected to be finalised this Autumn) will also support the Government's aim in focusing on how England harnesses innovation long-term and what benefit this can bring to patients.

The full impact of these changes will not be realised until well into 2023 and a watching brief must be maintained over the healthcare and market access landscape. Industry must now take the time to review how 'ready' they are for the new-look, integrated NHS.

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About the authors



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Steven heads up IQVIAs Market Access function and brings extensive Industry experience, having worked across a number of pharmaceutical companies, most recently at Merck where he led on Market Access across their broad portfolio.



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Neil's experience is drawn from 13 years working in the NHS, leading data quality improvement projects. He also worked for 6 years as independent healthcare analytics consultant across the NHS, Private Providers and Pharma.



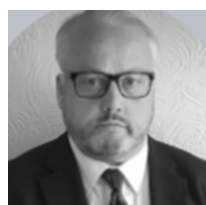
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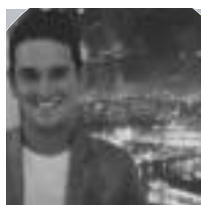
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Tijana joined the team as a Market Access Consultant and has experience in cost-effectiveness modelling, health technology assessment, business strategy and digital health innovation, having worked in several pharmaceutical companies.



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Nick joined the team as a Market Access Consultant after previously being a part of the Core Data team. He has experience in critically analysing and evaluating complex data, in order to offer practical solutions to issues within the life sciences industry.



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Tamsin joined the team as Sr Analyst and has previous experience working in Healthcare

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Zihao holds degrees in Biomedical Engineering at both undergraduate and master's level.

Before joining IQIVA, he worked in HEOR at Medtronic. Zihao has experience in the development of value proposition and the generation global value dossier.

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