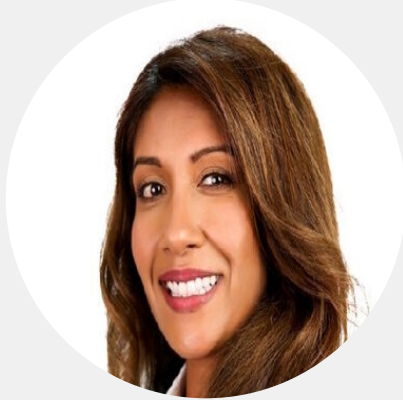


Roshel Jayasundera - Managing Partner, Axios

International



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Axios International has been designing and implementing access to healthcare solutions in collaboration with the pharmaceutical industry and other healthcare players across Latin America (LatAm), Europe, the Middle East, Africa, and Asia for over 25 years. Managing Partner Roshel Jayasundera outlines some of the key access challenges in LatAm today, the importance of insights generation and integration in solving these challenges, and the reasons a multi-stakeholder effort is required to fill the gaps in the “space outside the hospital”.

Could you begin by introducing Axios International and its business model?

Axios International was founded 25 years ago with a vision of transforming access to healthcare in emerging markets. In simple terms, this means ensuring that patients can access innovative medicines no matter where they are. We firmly believe that the country in which a person is born should not decide whether they receive treatment.

Our key clients are multinational pharmaceutical companies with pressing needs, seeking ways to ensure that their innovative treatment is available and accessible for patients globally in a sustainable manner. As emerging markets became evermore important to these companies over time, identifying access models that work has become crucial. We work closely with these pharmaceutical companies on developing a comprehensive access strategy and identifying

different pricing models and initiatives that will lead to the largest access impact. In addition to our advisory services, we have a prominent implementation arm which undertakes patient access programs and support solutions bringing our strategy work to life to reach patients.

How does Axios define access?

Access means identifying the right patient at the right time and enabling access to the right medication in the right manner. However, this process is just a small step. Once a patient can access treatment, the patient needs to be able to stay on that treatment to realise positive health outcomes and maximise the benefits.

For Axios International, access is all about understanding the holistic patient journey – from experiencing symptoms to acknowledging a need for support, navigating through healthcare systems to receive a diagnosis, obtaining a prescription and adhering to the treatment.

In your view, what are the major access challenges in Latin America (LatAm) today?

LatAm has a mix of high-, middle-, and lower-income markets, which presents varied challenges. Within each country, there are public sectors – often with varying levels of social insurance coverage – and the private sectors – either paid for fully out-of-pocket or via insurance.

For patients, this fragmentation and diverse options mean understanding which bracket they fit into and whether a medication is available to them is not straightforward. Moreover, being able to see a doctor immediately or having to wait six months could be life-changing for a cancer patient.

Our ambition is to unveil opportunities to overcome these challenges. We determine solutions and work together with both the public and private sectors seeking resolution. For example, the public sector's problem might be that their healthcare facilities are overburdened. In such an instance, Axios can work to bring care and treatment closer to the patients. On the other hand, patients with insurance may not have an access problem from an affordability perspective but might need help with the bureaucracy and require documentation to receive their medicines.

Across all our initiatives in LatAm, data is a crucial component. We deal with patients, their caregivers, and their healthcare professionals, enabling us to capture market insights. These can be used to improve the patient journey in a way that optimises treatment outcomes at a more macro level. Bringing patients and their caregivers back into society improves the overall economic

environment of a country as it supports them in returning to the workforce. However, we find that healthcare systems are often pressured to address short-term needs rather than medium- or longer-term solutions.

Does Axios have a unified strategy for emerging markets, or does it apply a customised approach?

A unified strategy for emerging markets would be ideal, but regrettably not feasible. While there are no 'one size fits all' solutions, there are commonalities, such as infrastructure barriers and overall healthcare system capabilities. Our approach is typically to take these commonalities, and then do a market specific deep dive to understand the challenges and develop an integrated access framework.

Axios was established in the late 1990s but has only been present in LatAm since 2018; why did it take so long and presently how relevant is the region to the Group?

LatAm is increasingly important to Axios. The access landscape has evolved; with patients living longer, more patients being diagnosed, and a significantly higher burden of chronic diseases. Despite the projected GDP growth since 2020 in most of the region, existing healthcare budgets and reforms are no longer adept at addressing the unmet needs, creating an access gap.

This calls for alternative mechanisms that enable patients access to treatment, which complement existing access routes in the public sector.

Given that Axios is a partner of pharma companies, how is impartiality maintained?

Pharmaceutical companies sponsor our programs; however, Axios' purpose is to transform access to healthcare. Our efforts are patient-focused and aim to impact as many patients as possible. Ultimately, we want to ensure that our access initiatives are designed with the highest ethical and compliance standards and foster multi-stakeholder collaborations to support our patients.

The COVID-19 pandemic saw treatments and vaccines move from bench to bedside and into patients' arms at record speed, necessitating a high degree of public-private

collaboration. Do you foresee a lasting impact on access in other therapeutic areas?

COVID-19 taught us that where there's a will, there's a way and that healthcare is an important global issue. Moving forward, collaboration between the public and private sectors is key. If the public sector is burdened, we should be able to leverage expertise in the private sector to continue to deliver care.

In 2023 and beyond, we must think of the space outside of the hospital and how healthcare can be delivered independent of institutions. Acknowledging the gap between the healthcare system and the patient would allow more players – patient associations, remote care technologies, or third parties similar to Axios International – to contribute to the continuity of patient care. A great opportunity exists to solve pressing healthcare access issues and drive sustainable impact.

How well developed are patient associations in Latin America and how will Axios International integrate patient voices into the access debate?

In LatAm, patient associations are very well established and have played a pivotal role in driving policy-shaping efforts. To give you a recent example, the new cancer law currently being drafted in Mexico has been steered forward by local NGOs.

Additionally, Axios International has a memorandum of understanding with UNIDOS, a Mexican NGO focused on Hodgkin's Lymphoma. We began collaborating with them because we realised they would help increase awareness among the broader public on the availability of a patient assistance program.

How well advanced is LatAm in terms of being able to generate the data needed to advise the decision-making process?

When it comes to data, there is structured data, and unfortunately, in a fragmented healthcare system, also unstructured data. There are many ongoing initiatives aimed towards rectification and fostering improved decision-making, but the full impact remains to be seen.

At Axios, we have patient support programs across the region. Through these programs, we gather insights while abiding by GDPR principles, of which an important criteria is data minimisation. Guided by the GDPR principles, we collect data in a very systematic manner, leveraging Axios+ digital tools to ensure an increase in access. Our ultimate ambition is to move into more AI-

integrated machine learning solutions to further accelerate access efforts.

What are Axios LatAm's focus areas going to be moving forward?

LatAm is of strategic importance for Axios International. We launched a series of celebrations last year commemorating our 25th anniversary, beginning with Mexico. It signalled to the region that we are here to stay, and ready to work across sectors to improve access to healthcare. Going forward, we aim to work with more patients in both public and private institutions, tailoring and catering our work to the specific challenges they face, while leveraging captured insights to contribute to broader access.

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