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Mario Martins lays out IQVIA Portugal's holistic approach to the healthcare sector, covering clinical trials, therapeutic studies, and technology solutions such as compliance CRM and quality control for manufacturing plants. He also foregrounds the importance of both local adaptation and global collaboration in capitalising on the unique challenges and opportunities present in Portuguese healthcare.

What is the current scope of IQVIA's offering and its strategic positioning in Portugal today?

While some view us as primarily a data company due to our history, we strive to advance healthcare and improve patient outcomes by intelligently connecting analytics, transformative technology, big data resources and extensive domain expertise. We provide a comprehensive approach of a product's lifecycle – beginning with clinical trials, encompassing phases one through three, involving recruitment, study implementation, and result delivery. Subsequently, we assist companies in developing therapeutic and pharmacoeconomic studies for regulatory submissions, a crucial step, especially in Portugal, where a substantial portion of drug approvals relies on our support.

We provide life sciences companies support through data monitoring, sales performance evaluation, trends analysis, and consulting studies. Adding another layer, we've ventured into

technology, offering a spectrum of solutions such as compliance CRM for Salesforce and quality control for manufacturing plants. Our comprehensive services extend to Europe, particularly in specialties like addressing providers and governments. We play a significant role in digitization, providing technology services to payers, providers, governments, and hospitals. A notable example is our ongoing project with the Portuguese government, focused on health measurement, aligning with the government's reorganization efforts and creation of Local Health Units since 1 January. The project involves creating tools for municipalities to understand their populations, enabling the development of public health programs based on comprehensive epidemiological data. This initiative, a collaboration with the Johns Hopkins Institute, is part of our commitment to enhancing healthcare systems, exemplifying our global reach and local impact.

Is the spectrum of solutions offered by IQVIA a result of a broader organizational strategy, or are these solutions tailored and adapted locally to meet specific needs?

In Portugal, our solutions are generally aligned with the broader organizational offerings. IQVIA Connected Intelligence helps connect the right technology, insights, and stakeholders to deliver the possibly best results at a fast pace. We make some adjustments to adapt to the local context, but often the applicability is a key factor to proceed with launch and implementation. I can give you an example of a Provider Performance Benchmarking tool, which facilitates hospitals in benchmarking their performance. We've used this tool to recognize and reward hospitals annually for excellence in quality of care. Each hospital receives a tool enabling them to compare their performance metrics with others, fostering a culture of continuous improvement.

IQVIA's approach isn't always top-down. Even in smaller countries like Portugal, there's room for local innovation and initiatives. For instance, a company acquired for its Provider Performance Benchmarking tool, operating in Portugal, Spain, and part of Chile, is being assessed for potential application in other countries. This approach allows for flexibility and responsiveness to local needs, ensuring that solutions are not only effective but also adaptable in diverse contexts.

IQVIA's engagement with innovation extends to collaborations with startups. Digitalization, especially post-pandemic, has gained significant momentum. An example is our collaboration with a startup providing a platform connecting doctors with comprehensive information, from guidelines to triage decisions. We chose to accelerate the growth of this startup, linking them with other institutions and life science companies, establishing a collaborative model that has been replicated in multiple countries, including Spain and Italy. The emphasis is not just on bringing innovations to

different regions but also on fostering the growth of local initiatives within the global network.

Managing a diverse portfolio in smaller to mid-sized countries poses unique challenges. How does IQVIA navigate and address these challenges in such markets?

In my view navigating a diverse portfolio in smaller to mid-sized countries is an exciting challenge. In these settings, we must be versatile and creative since we don't have the power of scale. While a larger team might specialize tasks, our team needs to be multifaceted. It's like having several plans in action simultaneously, and that, in a way, is intellectually stimulating. We embrace the challenge by constantly seeking innovation, not just within ourselves but by collaborating with external partners.

This approach is ingrained in our DNA. Seeking synergies and driving growth through initiatives that involve external partners is a key aspect of our strategy. It's not merely about the current services we offer; it's about continually exploring ideas and supporting innovative companies that, in turn, help us evolve. While we may lack the scale of larger countries, we compensate by being an innovative force, bringing fresh ideas and approaches to IQVIA.

Could you shed light on the prevailing trends in healthcare delivery and access to medicines provision for 2022-2023?

Overall, the prevailing healthcare trends seen in other countries are also present in Portugal. Oncology stands out as a significant growth driver, aligning with broader global patterns. However, while these trends are common, the landscape in Portugal has its unique challenges, particularly in market access.

Market access presents challenging hurdles especially in a smaller country like Portugal. For example, reference pricing is a practice that requires careful consideration. Portugal often finds itself being a reference for larger countries like Brazil, impacting the pricing strategies of pharmaceutical companies launching new products.

We have even seen the interconnectedness and the challenge of aligning prices across countries sometimes lead to delays or non-launches in Portugal. If a drug is sold for a slower price in Portugal after being granted reimbursement in Brazil, this would cause the local authorities there to demand a renegotiation. Therefore, it is not unheard of for companies to choose to not bring certain drugs to Portugal.

The pricing structure also influences export dynamics. Portugal's status as an export-oriented country stems from the government's incentivization, as margins for wholesalers are often higher in export markets than in the local market. However, this export-oriented approach, coupled with global disruptions, contributes to shortages we see in the country. Moreover, the dependence on China and India for active pharmaceutical ingredients (APIs), combined with changes in production control, has led to challenges in the supply chain.

Due to the interconnected nature of the pharmaceutical ecosystem, addressing these challenges will require a holistic strategy. Solutions need to consider Portugal's unique position, balancing its GDP, healthcare expenditure, and the intricacies of the global pharmaceutical market. It's not a simple question of money, given that Portugal has an approximate 10,6% of GDP expenditure being used for healthcare, according to OECD 2023 report – a favorable portion that is slightly above of other OECD countries. The challenge of shortages and access, especially for innovative medicines, is likely to persist. This means we need to focus on continuous monitoring, adaptation, and collaborative efforts between industry and government stakeholders to find the right solutions.

What notable impacts have been observed with budget constraints and pricing caps influencing access to innovative medicines in Portugal?

The government implemented measures to control expenses, especially in the pharmaceutical domain, which constitutes only 13% of the overall healthcare budget. Despite being a relatively small part, the government has sought to exert greater control over pharmaceutical expenditure.

To manage the budget constraints, the government introduced agreements and caps on spending, aiming to keep the pharmaceutical market within a specified limit, initially around 2 billion euros. The caps were subsequently adjusted based on GDP growth. However, this approach has created complexities in the system. Companies achieving success in launching innovative products face challenges in controlling demand, as negotiations with pharmaceutical reimbursement involve agreements on both price and the number of patients covered.

One noteworthy challenge is the issue of paybacks or clawbacks. Some pharmaceutical companies, in their negotiations with the government, offer reimbursements or discounts for a specified number of patients. However, the government does not deduct these amounts from the overall healthcare budget, leading to a potential underestimation of the actual pharmaceutical expenditure.

The complex negotiation landscape along with potential reductions in profit margins globally due to falling prices in the US creates uncertainty for pharmaceutical companies. The reduction in profit margins in major markets could prompt companies to seek compensations or adjustments in other markets, including Portugal. This dynamic reflects the interconnected nature of the pharmaceutical industry, where decisions in one part of the world can have effects globally.

Portugal is actively positioning itself as an attractive location for clinical research, but do you feel that it has a compelling value proposition for global trial sponsors?

While our low costs and high level of professional infrastructure are potential advantages, there are still challenges that impact Portugal's ability to fully succeed in attracting clinical trials.

Bureaucracy poses a hurdle to the efficiency and speed of conducting clinical trials in Portugal. Currently, Portugal captures around 150 million euros directly from clinical trials, a considerably lower figure compared to countries like Belgium who is similar in size. We look forward to see more clinical trials being conducted in Portugal, improving patient lives and increasing access to innovative medicines.

The slow recruitment of patients is another challenge faced by Portugal in the realm of clinical trials. The country is working to address this by implementing initiatives like the Portugal Clinical Trials Portal, aimed at streamlining the process and making information about clinical trials more accessible to both healthcare professionals and potential participants.

To be competitive in clinical trials, Portugal needs to address the political and organizational aspects of the process and leverage our prime site network globally. There is a call for a more business-oriented approach that incentivizes the right activities. Additionally, aligning the incentives for healthcare professionals, particularly those involved in the execution of clinical trials, is crucial. There is a current disconnect where the money often stays at the hospital board and doesn't directly benefit the professionals conducting the trials which they see as additional work. Therefore, it is not motivating for doctors to want to participate. Without their buy in, this just adds another hurdle to the list of challenge Portugal must overcome.

The EMA has established a common database for EU-wide clinical trials. Who holds the responsibility for managing this data in Portugal?

In Portugal, Shared Services for Ministry of Health is responsible for implementing and managing shared services and digital solutions, supporting the implementation of digital health initiatives, such as telemedicine, electronic health records, and digital health platforms, contributing to the overall modernization and improvement of healthcare services in Portugal. They are moving forward with several initiatives such as the development of a Data Lake, working on the identification of the data structure of the Electronic Health Record (EHR) / Single Clinical Process (PCU), or even developing Business Intelligence tools and working on AI applied to Health. At IQVIA, we hope to build close collaborations and foster an innovative environment where every entity may add its expertise to help advance healthcare.

Looking towards the future, what growth prospects do you envision for IQVIA Portugal, considering the evolving dynamics of the pharmaceutical and healthcare industries?

Payers, Providers and Government (PPG) is considered a vital area for us. IQVIA is always increasingly involved with hospitals, government entities, and building out our CRO business.

Our focus on PPG aligns with IQVIA's broader objective of working collaboratively across all healthcare stakeholders. The aim is to create a system that benefits patients, the country, healthcare professionals, and hospitals, emphasizing the importance of proper reorganization and incentivization. We see ourselves as a strategic partner in the transformation that Portugal needs in these areas. We have and will continue to play a crucial role in implementing projects that leverage Portugal's healthcare infrastructure and expertise. From clinical trials, data management, and various other projects, I hope to be in regular contact with the government regulators to provide our support as a world leader in providing services in capabilities to the local healthcare ecosystem.

IQVIA Portugal's mission revolves around accelerating innovation for a healthier world, achieved through cross collaboration with partners in the healthcare industry. Our goal is to make a positive impact on the lives of ordinary people, and this mission serves as a driving force for everyone within IQVIA.

As a final message to health authorities, what key points or insights would you like to convey from the perspective of IQVIA?

One of the challenges I want to highlight is the need to assure the sustainability of the healthcare system. The expenditure rise in healthcare is a fair concern for Government, Regulators and Payers, but ultimately everyone is working towards the same goal: providing the best quality of care to patients, improving lives.

If we can convey to work together towards this common goal, we will reach a conversation point where everyone is keen to make the necessary compromises.

It is important to remind that the most critical success factor for the pharmaceutical industry, particularly during the launching phase, it is the effective access to information and have previsibility of when the medicine may be available in the market but also the pricing conditions.

On the other hand, Governments, Regulators and Payers are fairly concerned about the rise of Health Expenditure and how to make the healthcare systems more sustainable So our role is to provide the evidence, tools, and expertise to connect the dots and help our country moving forward in terms of healthcare accessibility.

It is important to note the timeline for reimbursement in Portugal is significantly longer compared to some other countries. We see some countries separating the regulatory body and the HTA body, which is contributing to a more streamlined process.

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