

Interview: Stefan Buguslawski - President PEX

Pharmasequence, Poland



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Stefan Buguslawski, president of PEX Pharmasequence, a leading Polish healthcare consultancy and market research company, highlights the current obstacles facing the Polish healthcare market and the dynamics of the domestic pharmaceutical industry. He also discusses the innovative services they provide and how their offering will develop in the future.

As the president, could you introduce to our international readers PEX Pharmasequence?

After eight years of working at our former company, Sequence, we took the chance to merge with Pharmaexpert in 2016 to form, PEX Pharmsequence. This has opened up an abundance of opportunities as we are combining Sequence's prowess in healthcare consultancy and market research with the Pharmexpert, the leading supplier of Rx pharmacy data on the Polish market.

It is an extremely positive platform for potential growth as we can now provide services for all players involved in Polish healthcare – starting with the pharmaceutical industry as our main clients and also looking at the other aspect, such as medical service providers, public institutions, universities and many other associations and government organizations.

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We strongly believe that the Polish healthcare ecosystem is becoming a very complex mechanism and each area is interacting more and more with each other to create a diverse network. This, requires an understanding of regulations, behaviour and strategy of state holders, technology, interests of patients and consumers as well as the needs of medical professionals. This intertwining and complex system means companies requires the services of PEX Pharmasequence, so they can navigate the market effectively.

The consultancy market in healthcare is quite competitive. What have been the challenges with building a reputation in such a short period of time?

Both companies prior to the merger already had strong market recognition; therefore, this is a chief reason we chose to join the names together to prevent any confusion. This strategy has worked thus far as the healthcare consultancy market is relatively small in Poland, and larger competitors, such as the big-four [*i.e. PWC, EY, Deloitte, KPMG*] are focused mostly in other sectors and not specifically engaged in healthcare.

What is the current scope of your clientele?

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We are absolutely concentrated in the private sector as the public sector in Poland does not historically partner with consultancy firms. Nevertheless, we do work closely with public players in regard to our clients' regulatory affairs and they are very respectful of the data and knowledge we bring to the table.

What is the biggest challenge facing your clients in the current Polish healthcare ecosystem?

The largest obstacle is the low level of public financing of therapies, and the pharmaceutical market in comparison to other countries in the region, such as Hungary and the Czech Republic, is relatively underfunded in Poland.

This is a major factor in preventing pharmaceutical market growth, and innovative drugs, that are generally more expensive, are unable to be accessed by patients. Furthermore, there is not way of co-financing these therapies or having them purchased via private medical insurance. The public funds are spent mostly on generics that come at a cheaper cost, preventing the market penetration for specialist, innovative treatments. In our expert opinion it is unlikely that these market dynamics shift anytime in the near future as public funds for pharmaceuticals will remain at a low level.

How would you describe the dynamics of the local pharmaceutical market?

In the domestic pharmaceutical market there are three distinct areas: Rx reimbursed products, Rx non-reimbursed products and OTC. The easiest to predict is OTC and we see continual growth and large advertising campaigns being put forward directed towards patients. Polish patients recognise brands, and now the government is regulating issues around advertising and overuse of the treatments.

The Rx market is driven by reimbursed products and there is an increase in price pressures due to the current reimbursement system. The constant updates of the reimbursement list put pressure to further drop the price of the reference drug; therefore, stimulating reduced prices across the generics market. Furthermore, the first equivalent rule [*i.e. compulsory 25 percent drop in a drug price once the first generic hits the market*] adds to these lowered prices.

The Rx non-reimbursed products have looser regulations, and this is the space where companies can execute their market strategies. The fourth area is national drugs programs, and this is made up of speciality treatments.

What innovative services do you offer that allows your clients to manage the changing dynamics of Polish healthcare?

We are going in two distinct directions. Firstly, we report to our clients in broadly understanding the market access process in place in the Polish healthcare system. We provide data, such as real-world evidence, and involve the discussions with key opinion leaders and governmental stakeholders, such as AOTMiT, the Ministry of Health and National Health Fund. Really, we design and implement market access strategies related to each step of the process, excluding health technology assessment (HTA) preparation, and we undertake this task with external partners.

The second direction is the constant participation in public dialogue that is related to regulatory changes. The current government has been very active in the development of healthcare regulations, and we believe this will be the case in the future. These changes impact the pharmaceutical business to a large extent, such as the changes to the hospital referral model and the position of primary care doctors within the system. This impacts both the generics and innovative side of the pharmaceutical industry, and we must support the companies in understanding processes and helping them engage key governmental stakeholders in a constructive manner.

How will you advance your services moving forward as the company grows?

We want to utilize our data resources as much as possible. We have very unique competencies as our in-house data storage and analysis is well known for its quality, and we will continue to increase this capacity moving forward. Moreover, we want to increase our forecasting capabilities as with our information we can predict scenarios so our customers can get a picture of the future market.

To grow the business, we are working heavily with associations as they are the gate keepers to obtaining new clients that enter the Polish market. Furthermore, we are working heavily with senior management and building awareness through word of mouth, and possibly are looking at brand advertising in the future.

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