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Taher Hassen, GM for Morocco and Tunisia at Merck, gives insights into navigating market access in the complex Moroccan pharma market, outlines the challenge of introducing biosimilars, and the enduring importance of North Africa for Merck.

Looking back four years ago to when you arrived in Morocco, how different was the situation from what you expected?

It was not so different from my expectations as I had worked in Morocco previously as Merck's Head of Marketing Oncology for North & West Africa. I knew the management and a big part of the team that was already in place so there were no big surprises in terms of daily operations. Morocco is also a very welcoming country, therefore, my integration was almost immediate

However, I have learned a lot of new things in terms of Merck's partnerships and peers, as well as the country's overall business environment. Living here has allowed me to deep dive into the country's dynamics, gain a better sense of the challenges that lie ahead, and set an effective strategy for the coming years.

How volatile is the Moroccan market, given that the country is generally seen as one of the most stable in the region?

Morocco is a very attractive country in terms of investment, given its stable currency, good infrastructure, industrial production capacities, and connectivity with Europe and the rest of Africa. I would not use the word “volatile” to describe Morocco, but rather “dynamic.” In the last couple of years, the market has grown consistently and made regular improvements in terms of access to and quality of healthcare and medication. More Moroccans have medical insurance than ever before and hospitals – both public and private – are improving their services day after day. The market is not optimal in term of maturity, but it is heading in the right direction.

In Merck’s areas of expertise – oncology, neurology, fertility, cardiology, diabetes & endocrinology – we are also seeing a tangible improvement in access.

The point where we, as a country, need to put more focus is access to innovation. We are raising awareness to more widespread and comprehensive consideration of pharmacoeconomic assessment tools, which show the true value of treatments beyond the immediate cost and their potential savings to healthcare systems throughout the years

Merck differs from other multinational companies through the breadth of its portfolio, which spans various therapeutic areas as well as solutions for other industries. How is this service offering progressing in Morocco?

Science and technology are at the heart of what we do at Merck, from advancing genome editing technologies and discovering unique ways to treat the most challenging diseases to enabling the intelligence of devices. Merck is everywhere. This is a very wide and unique offering for pharmaceutical, industrial and research professionals as well as regular consumers & customers.

In Morocco, we have opened up our technology to peers and have shown our willingness to help with knowledge transfer in terms of biotechnology specifically. We are at the forefront of new techniques in biotech production and this knowledge transfer helps achieve one of our strategic objectives: to support patient access to medicines across the world.

We have a huge production capacity and capability in Morocco because the know-how was transferred 50 years ago. This is why today, looking at the latest IQVIA market data, 80 percent of currently marketed products in Morocco are manufactured locally. This achievement is the fruit of a productive collaboration between multinationals and top local companies and a supportive

regulatory framework. Now, we are looking to further enhance this collaboration on research and development.

How challenging is it to introduce biosimilars in the region?

Biosimilars are becoming increasingly important in our current context. The challenge with biosimilars in North Africa is first the regulation that has to be aligned with European and/or US regulation, and second the scale of the return on investment. Today, facilities for biotech production are very expensive and need to run on a large scale. Considering the current level of access in our countries, it does not make sense to implement immediately the full manufacturing infrastructure needed for biosimilars. This is especially true if all companies go into similar therapeutic areas and indications. However, many players have started a gradual added-value process towards full manufacturing locally.

One idea that came up during a 2016 forum held by Merck on this topic was how to create an entity which can assess the need by country and then work on an aggregate scale for North Africa to provide the right medications to the right patients, sustaining both finances and access. This is difficult. It is not a matter of capacity, but a matter of access, coverage, and number of patients to be treated. Perhaps in the future, an opening up of collaboration and sharing of know-how will trigger new solutions.

How long has Merck been in Morocco and what is the company's footprint in the country today?

Merck celebrated its 350th birthday two years ago. It gives us great pride to belong to this unique organization with such a strong and long heritage. In Morocco, Merck has been present for almost 30 years. Our business is split between biotech innovation in multiple sclerosis (MS), oncology and fertility, where we are one of the leading companies in the world, and our core established portfolio in cardiology, diabetes and endocrinology where we also show this global expertise and leadership. The affordability and high quality of our established portfolio is vital in countries like Morocco. Developing top-notch products or solutions is pointless unless patients can access them.

Morocco represents about 30 percent of the group's North Africa business and has consistently and sustainably grown at a double-digit rate over the past four to five years with no major product launches or inorganic contributions. Things have been tangibly improving over the past five to ten

years in Morocco and we see an increased focus on treating more, treating better, and treating in a more timely manner.

We at Merck, truly believe we are very well positioned to continue to deliver sustainable solutions for our patients.

Why is Morocco so important for Merck within the region? Does your portfolio better suit the Moroccan market, is it the infrastructure you have in place, or is it your specific market approach?

Merck penetrated the market 30 years ago with high quality and high efficacy drugs that were also very affordable. That is one of our key success factors.

The challenge today is the cycle of innovation. If you do not instil innovative products in your portfolio, eventually a decline will be guaranteed. The challenge today for all pharma companies is to launch accessible innovation.

We have the right portfolio today. We are looking forward to expanding our established portfolio of efficacious, high quality, and affordable drugs. Our Biotech portfolio is also ramping up in Morocco, but we still see a lot of challenges here and there especially in terms of pharmaco-economic considerations of very innovative and mid to long-term cost-effective treatments

One of the key challenges for Morocco country managers is navigating a market which, although growing, remains of a limited size and at the same time is complex. How do you navigate this complexity?

Indeed, Morocco is a promising, growing and complex Market. In terms of how we deal with this complexity today, I believe it is very dependent on the portfolio, its maturity, and how patients can access the proposed solution.

The regulators are very open and willing to collaborate, discuss, and investigate win-win possibilities and additional funding opportunities which we all acknowledge and congratulate. They are open to sharing best practices from other countries with great similarities to Morocco in terms of GDP and epidemiological profiles.

How has Merck been collaborating with other stakeholders to ensure affordable access?

Merck is at the forefront of discussions about integrating pharmacoeconomics into drug pricing and reimbursement debates in Morocco. We want more data into the real costs of a treatment to be used, not only the immediate costs so that the real added value of innovative healthcare solutions can be assessed on mid and long term. We also put real-world evidence (RWE) on the table so that treatments can be better assessed by relying not only on theoretical – clinical studies – but more importantly practical evidence.

Les Entreprises du médicament au Maroc (LEMM), the Moroccan pharma association for international research-based companies, where Merck sits in the Executive Board as Vice President since more than 3 years, has taken the initiative to bring together all the key players, from payers to regulators as well as industry stakeholders, around the same table to discuss key challenges in healthcare and how they can be overcome. Gathering all of these stakeholders is not necessarily easy, but this is a positive initiative that we will continue to contribute to in order to find optimal solutions to the ultimate benefits of Moroccan patients.

Our work on R&D, fostering local clinical research and discovery, is also relevant here. R&D and access go hand in hand. Two years ago, we held a very successful event on the potential of R&D in Morocco, which is simply huge. We have to connect with innovation and then also improve our R&D possibilities. That is a great lever of economic and scientific development in Morocco.

What has been the reaction of the Moroccan authorities to these concepts? Are they ready and do they have the capacity to process the information they are receiving from the industry?

We have to start somewhere. We see a big interest, but of course, reliable data is needed. The key here is clearly digitalization of the whole system in order to generate the right insights, trends and real-world analytics that should be the base of the future decisions. In our discussions, we offer our experiences and findings from other countries, but to implement these new concepts in Morocco, a lot of alignment and exchange is needed. Ideas from other countries cannot be taken and directly applied to Morocco without specific tailoring to country dynamics.

We firmly believe that with the contribution of public and private stakeholders, the healthcare system will be better positioned in the near future to provide personalized, optimized, cost-effective and equally accessible solutions to all Moroccan patients.

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