

Interview: Martin Spatz – Country Manager, QuintilesIMS Austria



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Martin Spatz, country manager of QuintilesIMS Austria, the global leader in healthcare market research, discusses the diverse range of services they provide to the two separate entities of the of Austrian healthcare system: the retail and hospital sectors. Furthermore, he provides an in-depth look at the positive impact of accurate market research on CRO activities and how the company’s forecasts are forming the basis for informed future decisions within Austrian healthcare.

What was your mission when taking up the country manager role only a few months ago?

Previously I had worked at TEVA and GL Pharma, hence coming to QuintilesIMS Austria was really a transition from the pharmaceutical industry to a service provider that acts as a consultancy for the Austrian healthcare market.

The mission when coming into my role was to manage the dynamics between the two differing branches of the business; Quintiles, a clinical research organization (CRO) that acts in a global manner, and IMS Health, a market research firm, that despite having a global reach, functions in more of a local perspective. Therefore, it was important to understand how to synergise the two cultures to ensure we make the most out of our assets.

Another concern of mine was to ensure the market research aspect is designed to be a lot more customer-centric; that is, moving away from purely an information supplier to more of a business model that is based around providing consulting services. Furthermore, we wanted to bring our technology to the forefront and make it more visible, such as our clinical research management

systems, data management and compliance tools.

Many members of the Austrian retail sector claim the industry has achieved negative growth in 2016, while the government states the sector has risen by around five percent. What is the correct figure?

If we are looking at the pharmaceutical market and more specifically the retail prescription business, including HCV treatment and products that are not reimbursed, the market in 2016 rose by around 1.4 percent. Earlier this year regulations were brought in to restructure the code of reimbursement; bringing the pricing of innovative drugs in Austria in line with the European average, as well as having specific regulations for biosimilars. I believe that these changes will curb the spending and it is likely by the end of 2017 the industry will experience around 3 percent growth.

Any member of any global pharmaceutical industry understands that this rate of growth is seen as acceptable. This number generally allows most innovative therapies to enter the market. It is all about finding the correct balance for all the stakeholders involved, and like any developed nation it is an ongoing evaluation process.

What are the tailored innovative services that QuintilesIMS is specifically bringing to the Austrian healthcare market?

At QuintilesIMS Austria we create an environment that provides customers with data that can be used locally for clinical trials and late phase studies. Real world evidence is a global company concept we have only recently launched in the Austrian market, and is based on providing information on products that are at phase IV or have already achieved market authorisation.

In Austria, we extract data from the entire healthcare network. We are able to perform this task at a high-quality due to our unique position in the market, having contracts with 100 percent of the Austrian wholesalers and close to 40 percent of the pharmacies. Furthermore, we are the only company that generates hospital data, covering 89 percent of Austrian hospital beds. This is extremely important in Austria as the retail and hospital sector are completely separate in many ways.

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This information from both ends of the spectrum allows us to accurately deliver information from which our customers benefit, such as creating a more effective sales team. Moreover, we have the largest and most accurate database in Austria that is able to connect nearly all healthcare professionals.

With our services, it is a matter of sitting down with our customers and constructing a tailored approach, with most of this work being ad hoc; for example, if a company needs specific information about the rebate they are offering we can consult on where they should apply the rebate and how this will affect their overall numbers. Therefore, we are not purely performing market research, but ironing out stakeholders' inefficiencies and developing a more streamlined healthcare system.

Nevertheless, we must do a better job in making our new business approach more visible to the greater healthcare community, as a large share only connect QuintilesIMS with market research. This is done by going out to customers, explaining what we do, and using past references to properly illustrate our diverse range of services.

Market research stems from the IMS health branch of the business. How are you able to use this information as an advantage to influence the Quintiles CRO aspect?

The company has begun an initiative called "the next generation", an exciting approach of combining our data within the clinical research aspect to improve site selection and patient inclusion into clinical trials. For example, when searching for a research site for a specific treatment, companies will have two possible sites, A and B. Site A may be more heavily considered as there is a greater patient population compared to site B, though numbers sometimes do not paint the entire picture. Using our data, we are able to demonstrate that site B is a better choice due to the fact patients in site A are already being treated with another drug that will significantly interfere with the results.

As you can see this is a game changer in the clinical research world, and will be an advantage for Austria more than for other countries due to our smaller population. Austria in general has always been considered a reliable clinical trial destination due to the fact global organizations understand there is a regulatory environment that promotes quick and easy access to patients. Furthermore, Austria is home to many world-renowned key opinion leaders, especially in neurology and oncology. Hopefully, with the new clinical trial directive put in place, Austria will maintain this competitive advantage.

Do you feel Austria is ready for biosimilars, the new wave of pharmaceuticals?

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In April, this year a regulation was put in place to differentiate biosimilars from generics; therefore, placing Austria more in line with other European countries in allowing companies to launch biosimilars onto the market without financial concerns. This negotiation between the reimbursement authorities and retail sector is an important step forward and will hopefully boost future launches. Furthermore, it supports Austria's strong biosimilar production capabilities that consists of global powerhouses, such as Novartis and Boehringer Ingelheim. I am proud that QuintilesIMS had the opportunity to contribute to realization of this new regulation with a study that proved the saving potential that arises from a deeper embracement of biosimilars in Austria.

How does Austrian healthcare industry compare to other nations in the region?

Bolder action from key stakeholders would be very much appreciated by the pharmaceutical industry. The reimbursement regulations need to be constantly updated to ensure the nation is still seen as an attractive destination for global players in the region, especially considering Austria has so much potential in regard to bright minds that are excited to bring innovation to the market. Furthermore, Vienna, in particular, is an innovation hub, being regional home to companies such as Boehringer Ingelheim, the Vienna Biocenter and many key opinion leaders.

QuintilesIMS is very heavily involved in forecasting. How important is this service for the company?

This is one branch I am extremely proud of and we have had some excellent legacy projects in this area. We have conducted forecasts for the Austrian Generics Association (OeGV) and the Austrian Biosimilar association, indicating the enormous potential for the market if there is an increase in generic and biosimilar numbers.

Currently we are working on a forecast for the Austrian forum of the Research-Based Pharmaceutical Industry (FOPI) and Association of the Austrian Pharmaceutical Industry (PHARMIG) based around thousands of parameters, such as reimbursement regulations, patent expiries and company portfolios. This is incredibly important in constructing a neutral picture of the Austrian healthcare future as at times the government exaggerates figures in one direction, and the industry in another. Once we are able to create this full picture it will form the basis for making

informed decisions and help with future discussions. This will have to be reevaluated again in 2018 when the framework put together between the reimbursement authority and retail sector is reevaluated.

What image do you want QuintilesIMS to portray as you move forward in your new role?

If you look closely at the work we are doing, in-essence we are a pharmaceutical company without the actual physical drugs. We conduct tasks such as market research, all clinical research activities, post-launch processes and look at sales force effectiveness. Now, we must make this more visible within the Austrian healthcare community, allowing the government and companies to leverage the high-quality services we provide.

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