Interview with Anna Gajec, General Manager, Cegedim Poland

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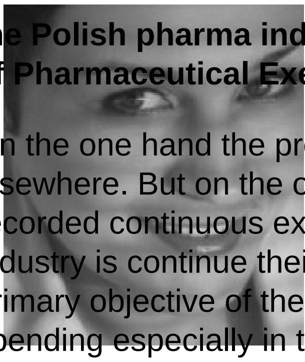
Cegedim Poland



bal reach and your 13 year experience of operating as a consultant to the Polish pharma industry, how would you describe the market to the international readers of Pharmaceutical Executive?

On the one hand the pressures and incentives influencing the main stakeholders are the same as elsewhere. But on the other hand Poland is the third largest pharmaceutical market in CEE which recorded continuous expansion over last 20 years. Naturally, the primary objective of the pharma industry is continue their mission to improve health standards and sustain profitability, whereas the primary objective of the national healthcare system is to introduce more and more control over its spending especially in the area of reimbursement. For those who observe the Polish pharmaceutical market it is obvious that competitive landscape has changed dramatically over last decade. Continued disputes over prices and reimbursement policy between government and industry had important impact on investments and product launches. Over the time generic products formed significant segment of the market.

Polandâ??s membership of the European Union (EU) is another factor pushing the country to align with European standards and regulations. However, Poland negotiated transition period after EU accession and still face issues with implementing the EUâ??s harmonized 8+2+1 data-exclusivity standard. Because of the idiosyncrasies in the Polish regulatory and reimbursement systems every single general manager in Poland must find a good, sometimes very specific operational way to conduct the business. As a consequence of these characteristics I would say that Poland is highly different to some others markets in the region.

Would you say that the idiosyncrasies of the Polish operating environment create significant challenges for the pharma industry?

The main issue is one of ambiguity. The regulatory environment is characterized for example by long delays for reimbursement approval. We also faced many discussions regarding potential changes to be introduced to the market and healthcare system. Since the proposed scenarios usually vary significantly one from the other building up long-term strategies in this capricious and ambiguous environment can be real challenge. Pharmaceutical industry continuously evaluates benefits but also risks which would appear together with different scenarios.

Regarding the upcoming 2012 reforms few companies have a clear idea about the direction of the market. How can Cegedim get ahead of the curve to advise its clients?

The change can be extensive. However, with so many factors which can influence the market I cannot imagine anyone saying that they are 100% sure what will be the overall impact of the proposed reforms bill. In terms of the reimbursement schema much will also depend on strategic decisions of our clients.

The way that Cegedim can help is as an observer with a bigger picture of the entire landscape of the pharma industry. Some impacts can be predictable like potential changes in operating strategies for existing field forces. Being global operator we have easy access to information what was the impact of similar changes introduced on other European markets. We are also ready to leverage methodologies and solutions which were implemented on other markets to support our clientsâ?? business.

Given this environment how does this impact on the type of services Cegedim offers from data to Customer Relationship Management (CRM)?

Knowing that there is going to be change in the market we need to be able to react quickly to adapt. If companies decide to relocate their sales&marketing budgets. We need to be able to provide new services adapted to new areas of activity.

Whilst there are category differences in the type of services Cegedim offers, we do not differentiate between them. The solutions that we find for clients are very often tailor-made to their business approaches. In fact, innovating and finding an optimal strategy which provides the best solution for an individual client is the most stimulating aspect of the work we do. Cegedim constantly re-examines its portfolio. The operationsl strategies of Cegedim on the polish market were developed together with the clients over last almost 20 years. The largest challenge is to react quickly to the market and to the many needs of our various clients. In Poland you need a brain that works in all directions in order to meet highly varied expectations of clients.The ever changing nature of the pharma industry makes it a stimulating environment.

Cegedim in Poland has to be extremely creative. The job is to realign Cegedimâ??s global strategies in Poland but the nature of the environment means that we have to be extremely attentive to the needs of our local clients.

Given the extensive bank of sales&marketing excellence data and information that Cegedim has collected we can paint specific trends and offer informed projections and benchmarks to the industry. This specific information can be combined with Cegedimâ??s experience in dealing with over 100 companies in the Polish market. This gives the company a good overview of the different corporate strategies. Naturally some will have greater merits than others and on the basis of this experience and our data assets, clients get a comprehensive solution.

On a third level, as a global company Cegedim can use its experience in working within the top 5 European markets and we leverage this experience in predicting and formulating strategy in Poland. As a result, we can speed up business processes in Poland.

Consultancy firms such as the big 4: PWC, Ernst and Young, KPMG, Deloitte as well as your competitors IMS Health offer the same global perspective when advising clients. How does Cegedim differ?

Cegedim fully understands what Sales and Marketing Excellence is all about. Within the service portfolio Cegedim carries out segmentation, targeting, marketing campaigns, promotional spending audits, patiens prescription data it also provides samples to doctors and has 200 medical representatives which we share with clients. So the portfolio is very significant.

Through OneKey Cegedim has extensive data assets with a bank of currently over 30 million call reports collected day by day. The company can therefore see the overall pattern and understand how business is being done in reality. Cegedim has been investing heavily in its data assets and currently collects information in almost all therapeutic areas,. which picture real trends in the markets.

Today, Onekey is the best source of information relating to medical professionals in Poland. Furthermore Cegedim can offer technology which will improve business processes in terms of CRM. Cegedim in Poland also has the internet portal for physicians Esculap.pl where they can interactively cooperate with our clients. Furthermore, Cegedim is the software provider for more than 60% of representatives in Poland. No other company can detail as accurately how the industry works.

We can provide many key information to the industry such as: over the last 10 years the population of sales representatives has increased from 6.5 to 11 thousand confirming how competitive the Polish market has become.

What can this Cegedim affiliate contribute to Cegedim globally in the next 5 years?

Looking at the variety of services existing globally, the affiliate is in the lucky position that there are still several fields in the country where the Polish affiliate can expand. In Europe we are already 54th in revenues (outside France)due to the market share in Poland.

In the global evaluation, Cegedim Poland has a regional team engaged in application engineering and implementation. The size of this team is now more than 70 people. Regional teams continue to be located in our affiliate in Poland. Poland has high educational standards for finding IT staff, and Poland is cost-effective for the group.

What would be your final message to companies making an assessment on whether or not to enter the Polish market?

The message to the international readers is that they should not be afraid of the Polish market.

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