

**Bringing Innovations to European Patients**



**IGES Pharma**

Bringing Your Innovations to European Patients

Market Access Capabilities | 2025

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# **IGES Pharma Overview in Europe**

# Overview



+80

Employees  
specialized on Pharma & Biotech



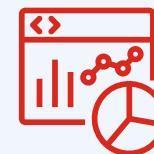
Highly experienced team  
with backgrounds in **pharma,**  
**regulators, HTA bodies,**  
**and payers**



**Multidisciplinary:** physicians,  
pharmacists, health economists,  
statisticians, and scientists



Part of **IGES Group** with  
**200+ experts**



+1,500  
Projects



**16 of 20 TOP** Big Pharma clients



**Full Market Access Launch**  
for emerging biotech & specialty  
pharma



**+150 HTA submissions**  
in Europe



Experience from **Ultra-Orphan**  
to **Primary Care**



**8**  
European countries



**Specialized consulting** for  
Pharma and Biotech in key  
European geographies



Representations in **Europe's**  
**biggest markets**

# IGES capabilities expands across all important European markets



## IGES Pharma

Part of athagoras with offices in 11 European countries (IGES offices in 8 countries)



**Strategy development to full-service product launches across key European markets**



Highly experienced team with backgrounds in **pharma, regulators, HTA bodies, and payers**

Legend:

IGES affiliates

IGES support via partners

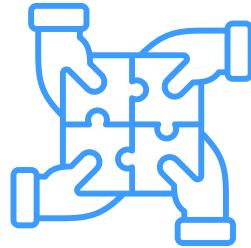
IGES offers no support



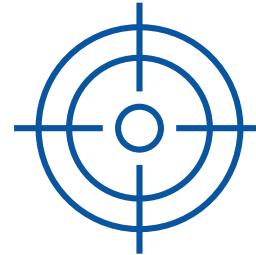
# IGES in the EU-HTA



Active participant among few consulting firms engaged in **EUnetHTA21 discussions, draft guidance consultations**, and strategic dialogue with EU institutions. Contributor to **public statements** on EU-HTA implementation ([IGES Pharma Insights](#)).



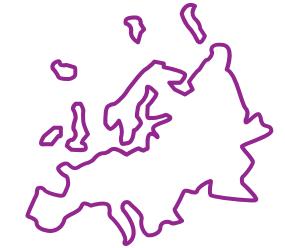
We collaborate with leading **Pharma Associations** to shape policy and expectations. We host formats and facilitate exchange of **coordination group** members, national HTA decision makers, and industry.



We work with pharma and biotech companies on early alignment of clinical development programs with EU HTA as well as **PICO scoping and prioritization**. Every step of the way, we follow a “glocal approach” that mirrors the hybrid character of JCA.



We are actively engaged in multiple **JCA procedures** in different stages with both fit-for-purpose evidence generation, ITC work, as well as JCA dossier writing. IGES is currently **involved in the first JCA procedures** that have started.



Our strategy starts and ends with the **Member States**. We connect EU-level processes with **local P&R realities**, ensuring implementation success across diverse national systems.

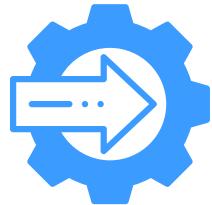
# Core Capabilities – iGES Pharma



**iGES Pharma** provides **tailored market access solutions** for pharmaceutical companies offering the whole spectrum of know-how, expertise and experience needed for your success. From **strategy development to full-service product launches** across **key European markets**. At iGES we understand that each product is unique and there is **no out-of-the box approach**. Instead, we **optimize patient access by tailoring our solutions to each product** and its individual strengths to overcome local and global challenges.

# The five pillars of IGES Pharma in the EU

## Early Access Strategy, Clinical Trial Optimization, G2M Strategy



We help our clients bridge the gap between **clinical development and patient access**. We develop **feasibility and strategic assessments** of early-access programs, optimize clinical trial design in line with HTA requirements and build go-to-market strategy.

## Asset valuation for in/out licensing



We **evaluate assets** through the **lens of access and P&R potential**. Our models combine payer and KOL evidence **expectations, market dynamics, and therapeutic value** to define **realistic commercial forecasts**. Whether buying or selling, we help clients uncover the **true market potential** of their products.

## EU-HTA support



We support during the **entire EU-HTA journey**, from scoping to submission. Our **pan-European network** ensures alignment between centralized EU processes and national HTA requirements. With **local experts in EU5 and Nordics**, we turn **EU coordination into actionable national success**.

## HTA submission and product launch at country level



We are present in the EU markets with **strong local experts** managing country implementation. We **prepare and submit national HTA dossiers**, negotiate pricing, and manage launch execution **across all EU countries**. This **local depth ensures speed, alignment, and credibility** with authorities.

## Post-submission support: Regional access, Commercial insights



We work with our clients **beyond submission**, ensuring their products real access on the ground. We support our clients **regional access requirements, products' adoption, LoE impact** and other considerations.

# Solutions – EU-HTA

## EU-HTA

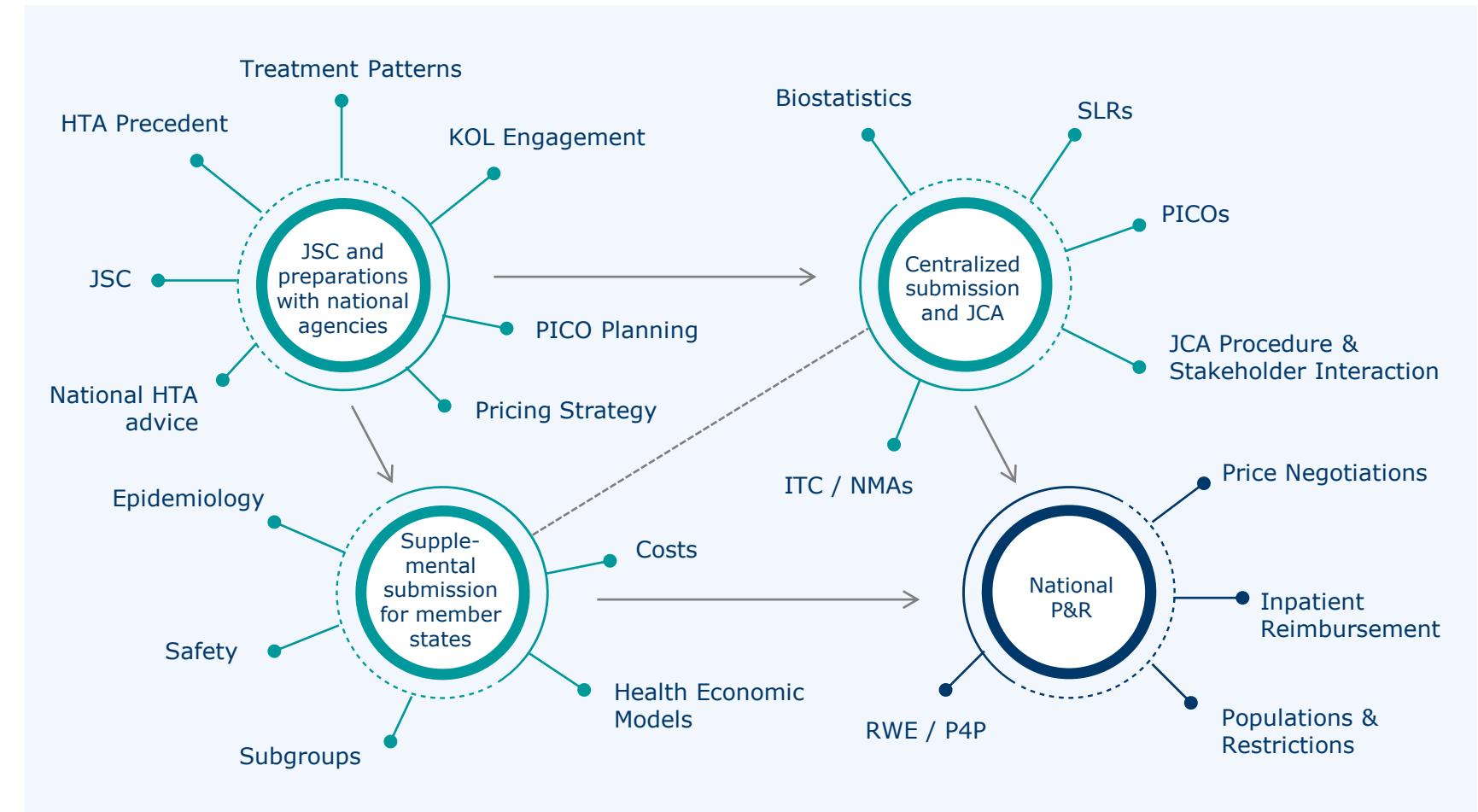
Navigating the harmonized European HTA framework that will be applied in stages starting in 2025 will be a significant challenge for all stakeholders.

While there will be a centralized clinical assessment, member States remain responsible for defining Populations, Comparators, and Outcomes (PICOs) as well as all decisions on Pricing & Reimbursement.

The resulting process is a hybrid system requiring perfectly aligned national and central activities.



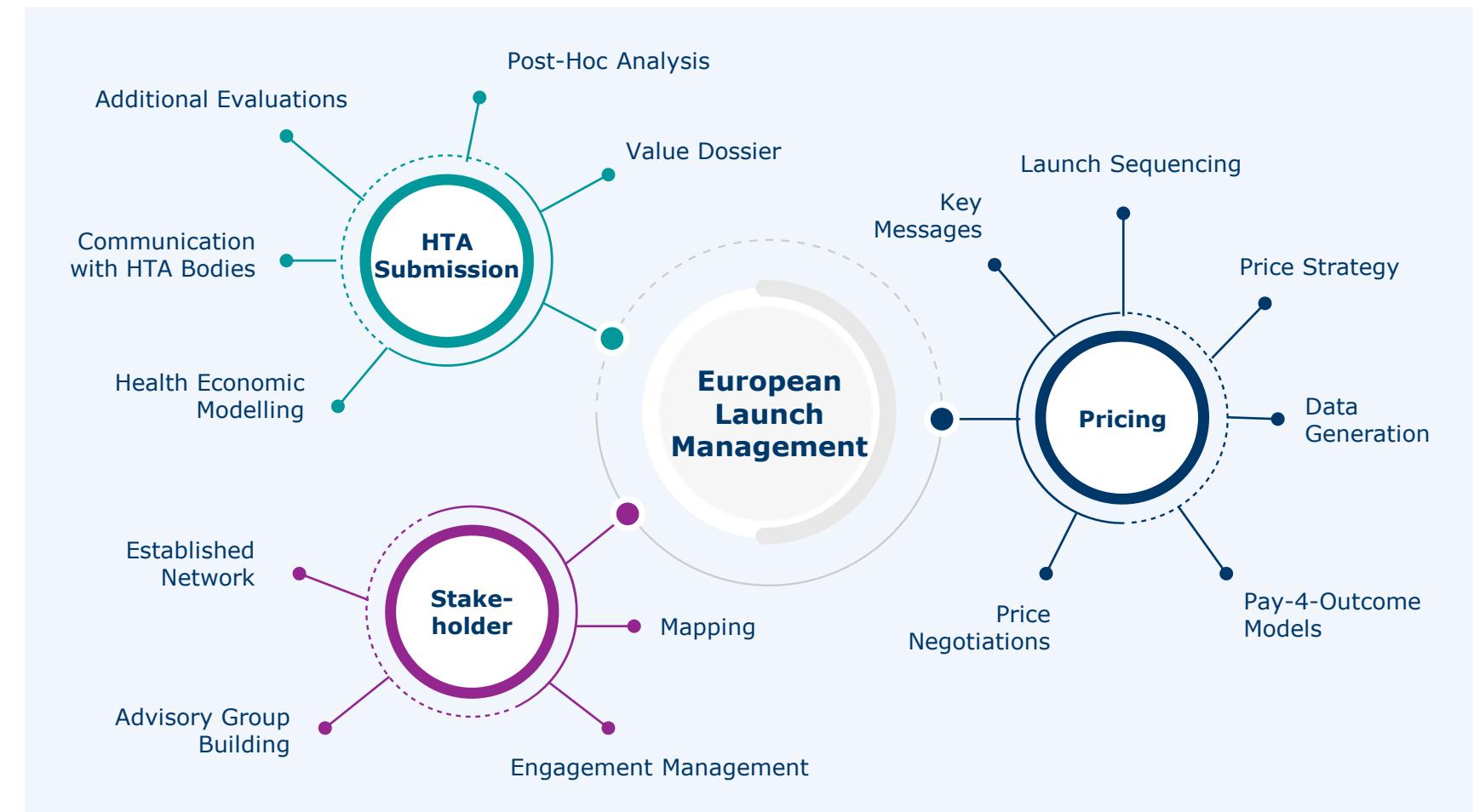
IGES has participated in the EUnetHTA21 consultations



# Solutions – European Launch Management

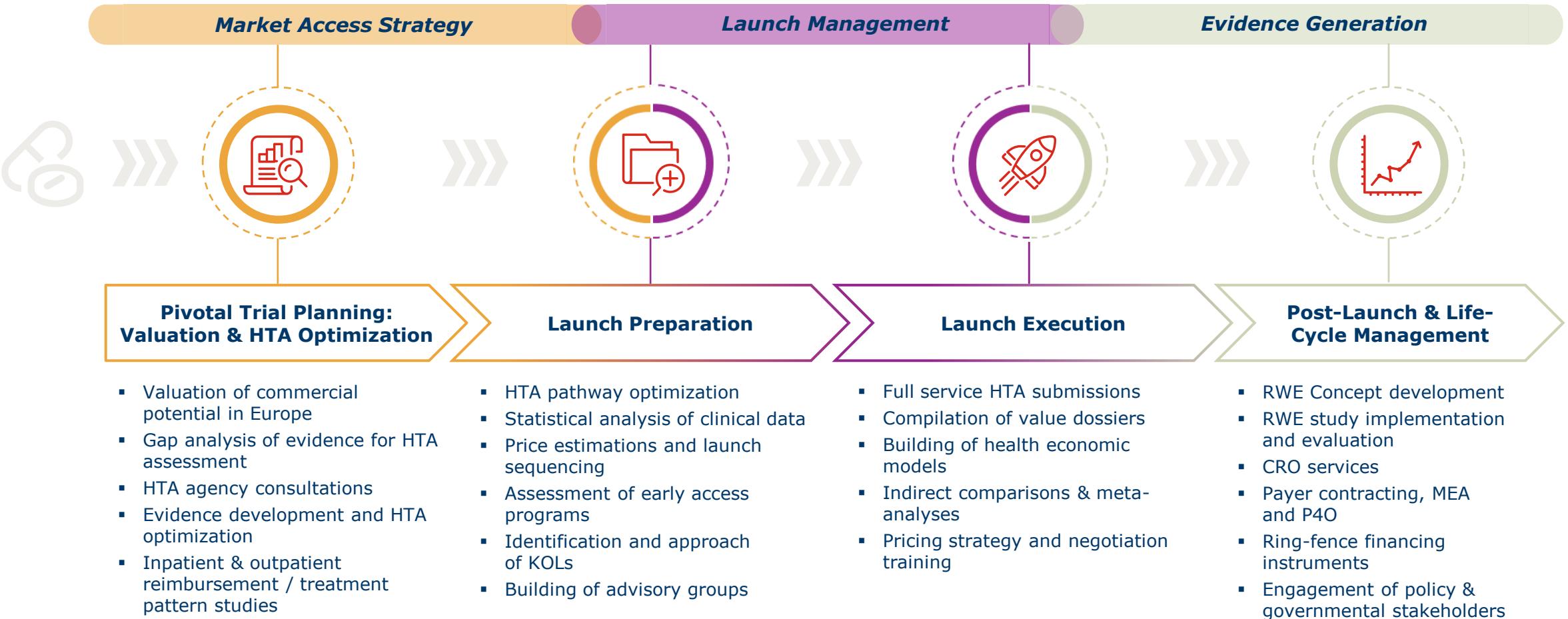
## European Launch Management

With its decades of experience in working for TOP Pharma companies, IGES Pharma has accompanied this industry trend and developed a tailored set of services and processes specifically for clients that operate very lean market access structures in Europe and its key markets. IGES Pharma can act as a fully integrated market access function to comprehensively handle all market access processes involved with launching assets into key European markets. From strategic planning to launch sequencing, from data analysis to health economics and HTA submissions, from KOL management to formulary decisions and P&R negotiations – IGES puts its experience to work for our clients so they can focus on making the key decisions and shaping the commercial strategy.



# Capability in-depth

# Portfolio along Value Chain



# Core Capabilities – Strategy



## Strategy

IGES with its vast experience in the realm of Market access can support your product from cutting through the complexity to find the right route of access via mapping out the necessary steps required to achieve your goal until the implementation of the required activities. Since IGES supports operationally along the whole Market Access process chain, we know what matters when deciding for scenarios and planning your activities.

# Core Capabilities – Stakeholder Engagement



## Stakeholder Engagement

Engaging the different stakeholders in the health care system while planning the launch of your pharmaceutical is vital. iGES can engage with all relevant stakeholder groups on your behalf such as physicians, payers, patient organizations or health-authorities. Through our many years of experience we can access a reliable network of experts and contacts to help you in setting up adboards, background talks or other platforms of debate.

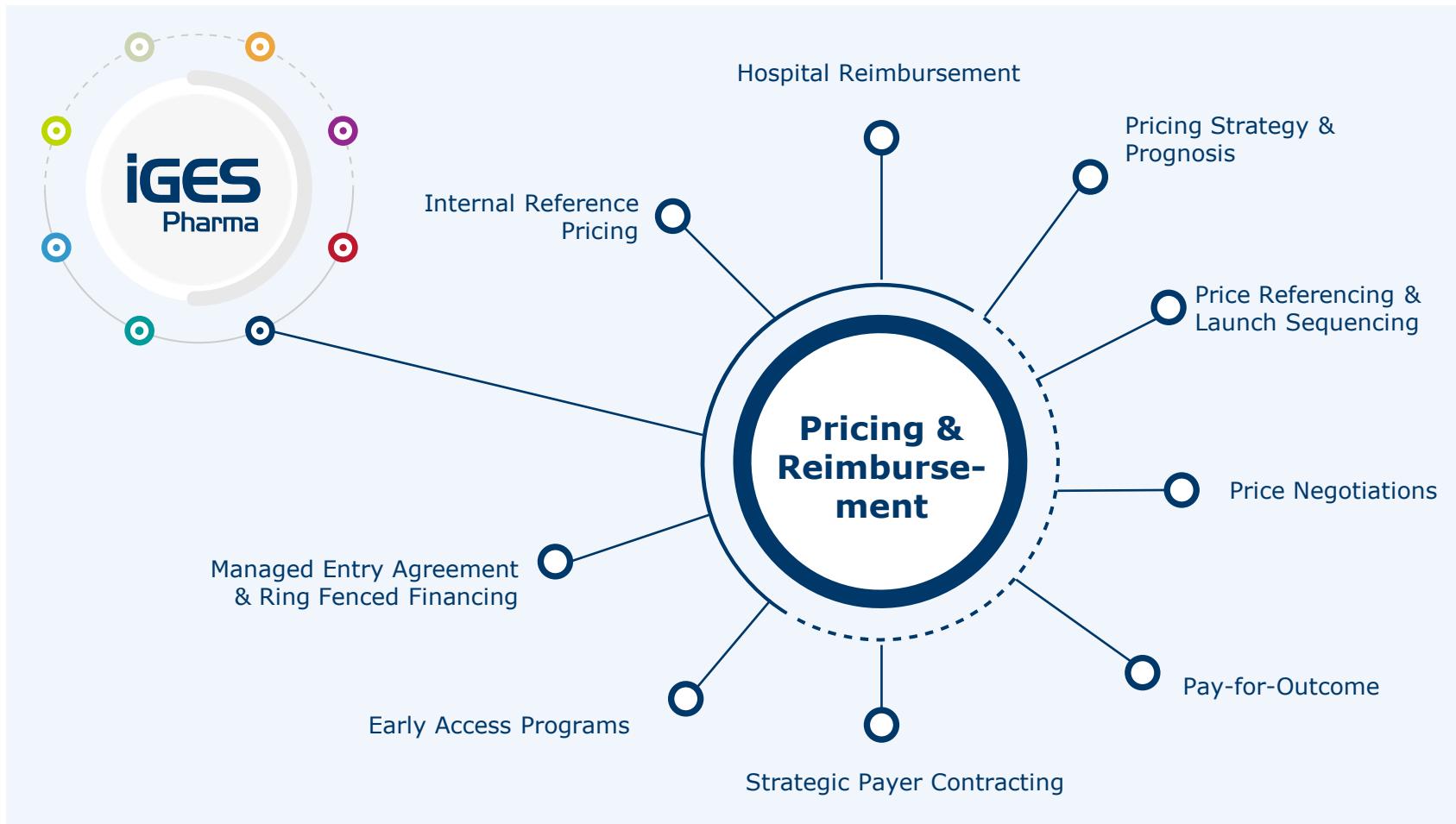
# Core Capabilities – Real World Evidence



## Real World Evidence

The collection of RWE may be facilitated as a proactive activity to enrich your HTA application or reactively as a requirement from local HTA process. In both cases, iGES can support in collecting RWE: from study conceptualization, study site recruitment, data collection, biostatistical analysis until result presentation and submission in HTA processes. With our in-house CRO and Biostats team we can support you along the way.

# Core Capabilities – Pricing & Reimbursement



## Pricing & Reimbursement

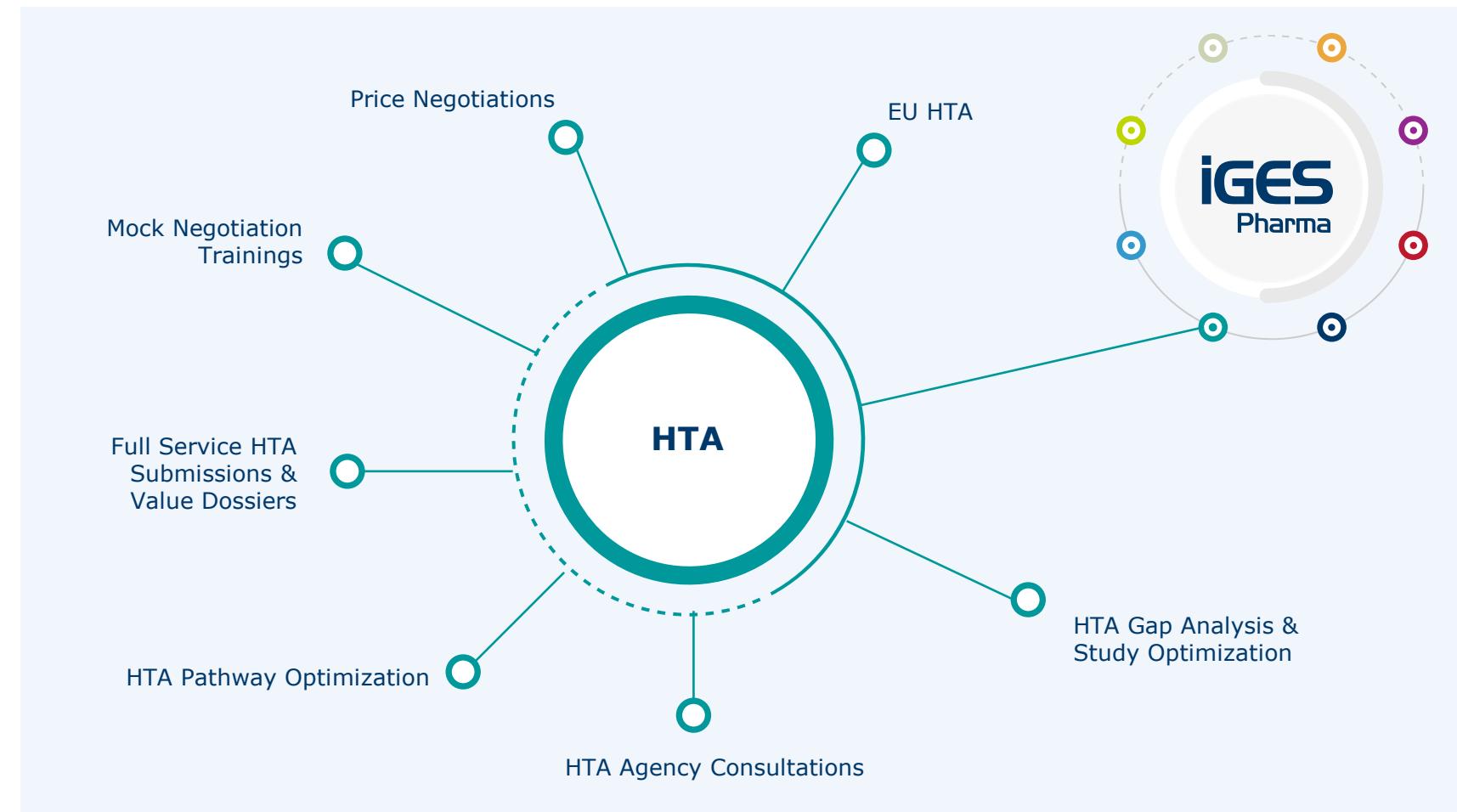
Finding the right price and ensuring patient access is key for the commercialization of your pharmaceutical product. IGES can analyze patient pathways both quantitatively or qualitatively to understand their position within their respective care setting. This way access hurdles can be identified and addressed. We can also support you early on with predictive data modelling to derive pricing estimates for your product or support your local price negotiations by doing the necessary research, deciding on a strategy, train you or even participate in the negotiations.

# Core Capabilities – HTA

## HTA

Wholistically handling HTA submission is a key competence of iGES with the experience of more than 150 submitted dossiers. The center of our efforts is to capture the value of your product adequately. By expressing its full potential in the respective HTA process, we make sure to create a solid foundation for meeting your price expectations.

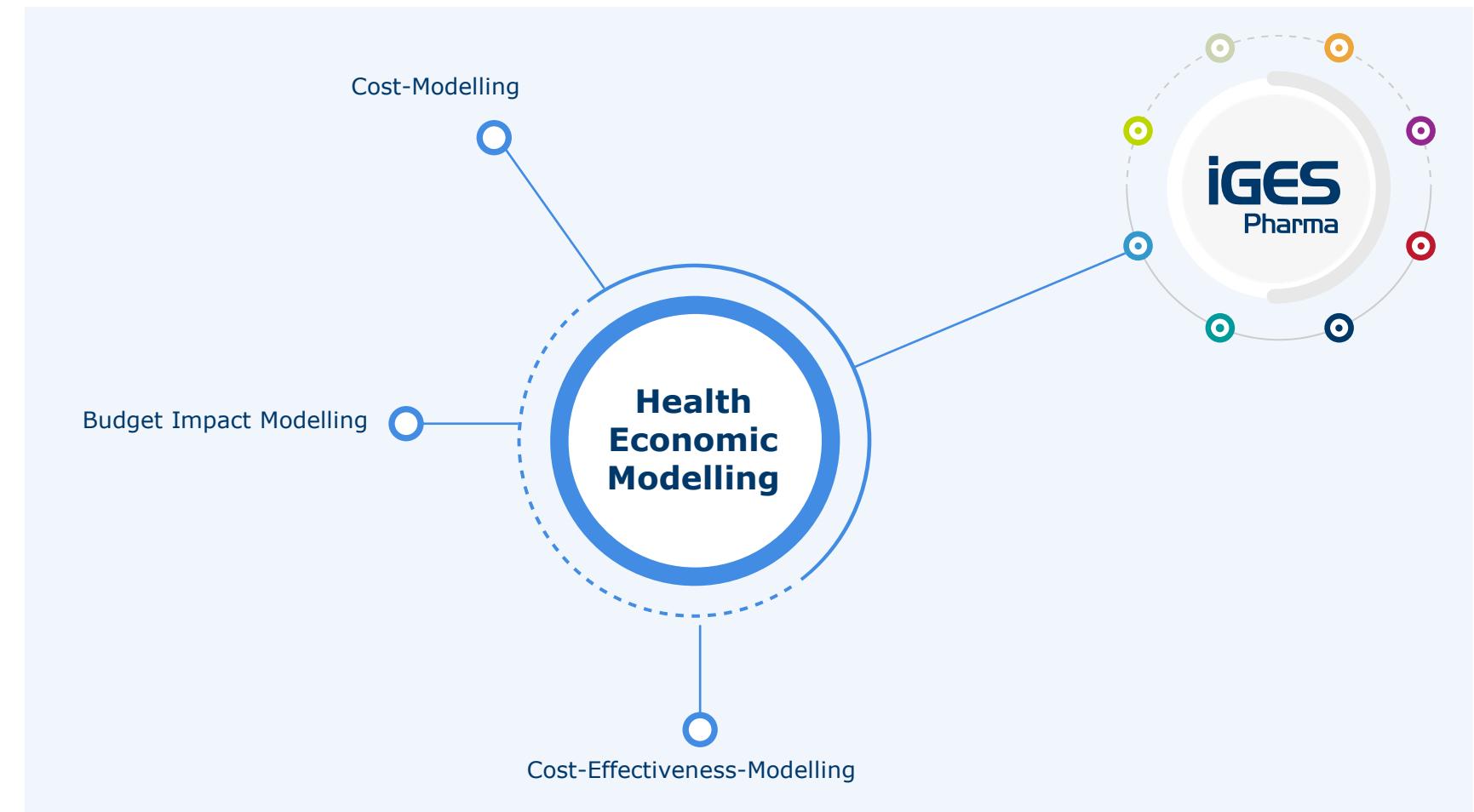
We manage the interaction with authorities, compile necessary documents and information and tend to the actual submission of the assessment materials. iGES will also prepare written statements, train for or participate in oral hearings on your behalf, if required.



# Core Capabilities – Health Economic Modelling

## Health Economic Modelling

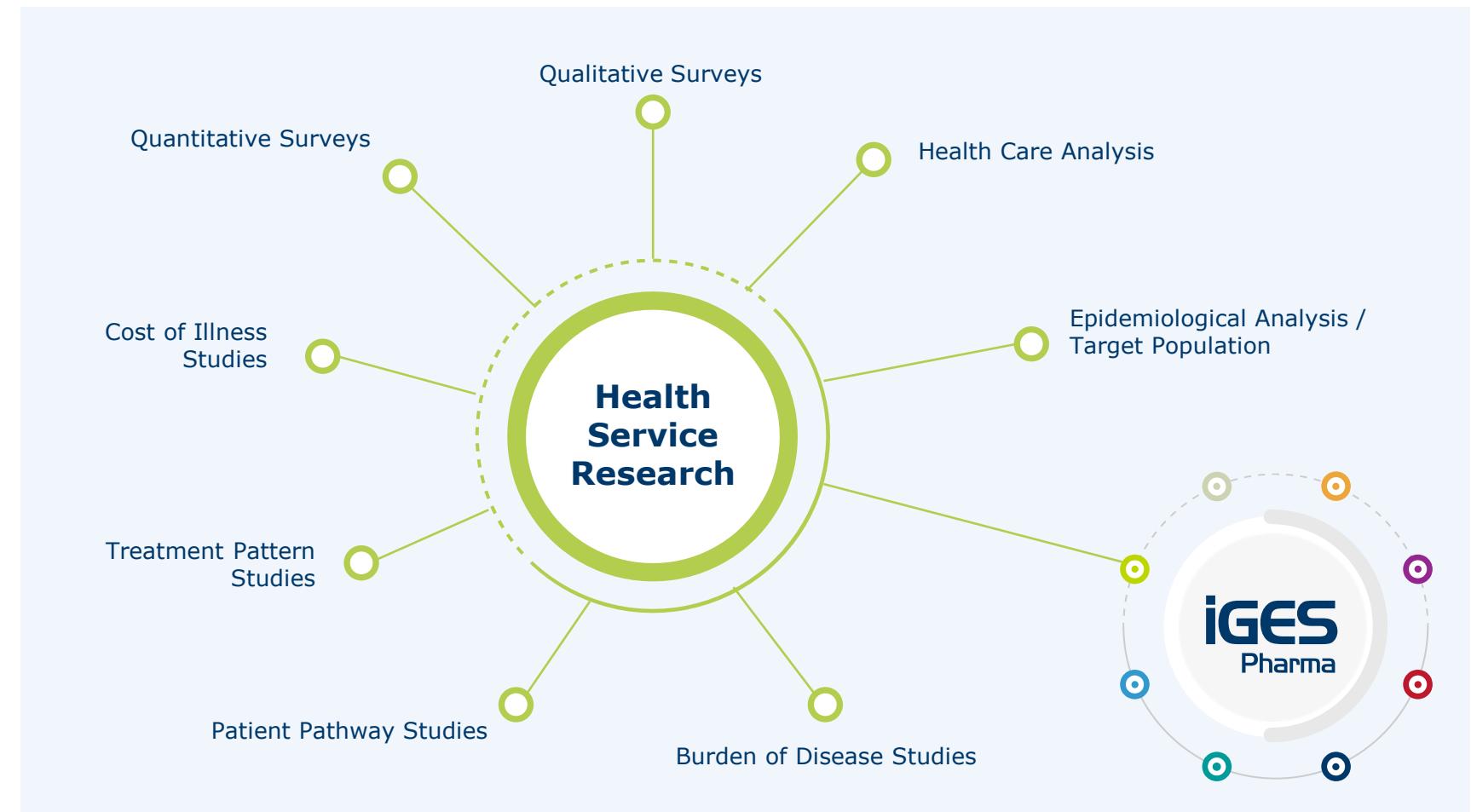
To understand the value of your product, it is important for health authorities to link its clinical benefit with its cost implications and compare it to the current standard of care. Building fit-for-purpose health economic models is one of IGES capabilities. Next to building the model itself, we can also support you in identifying the relevant clinical and economic evidence via systematic literature reviews and guide you along the decision-making process to reach your optimized outcome models is one of IGES capabilities with its experienced and awarded team.



# Core Capabilities – Health Services Research

## Health Services Research

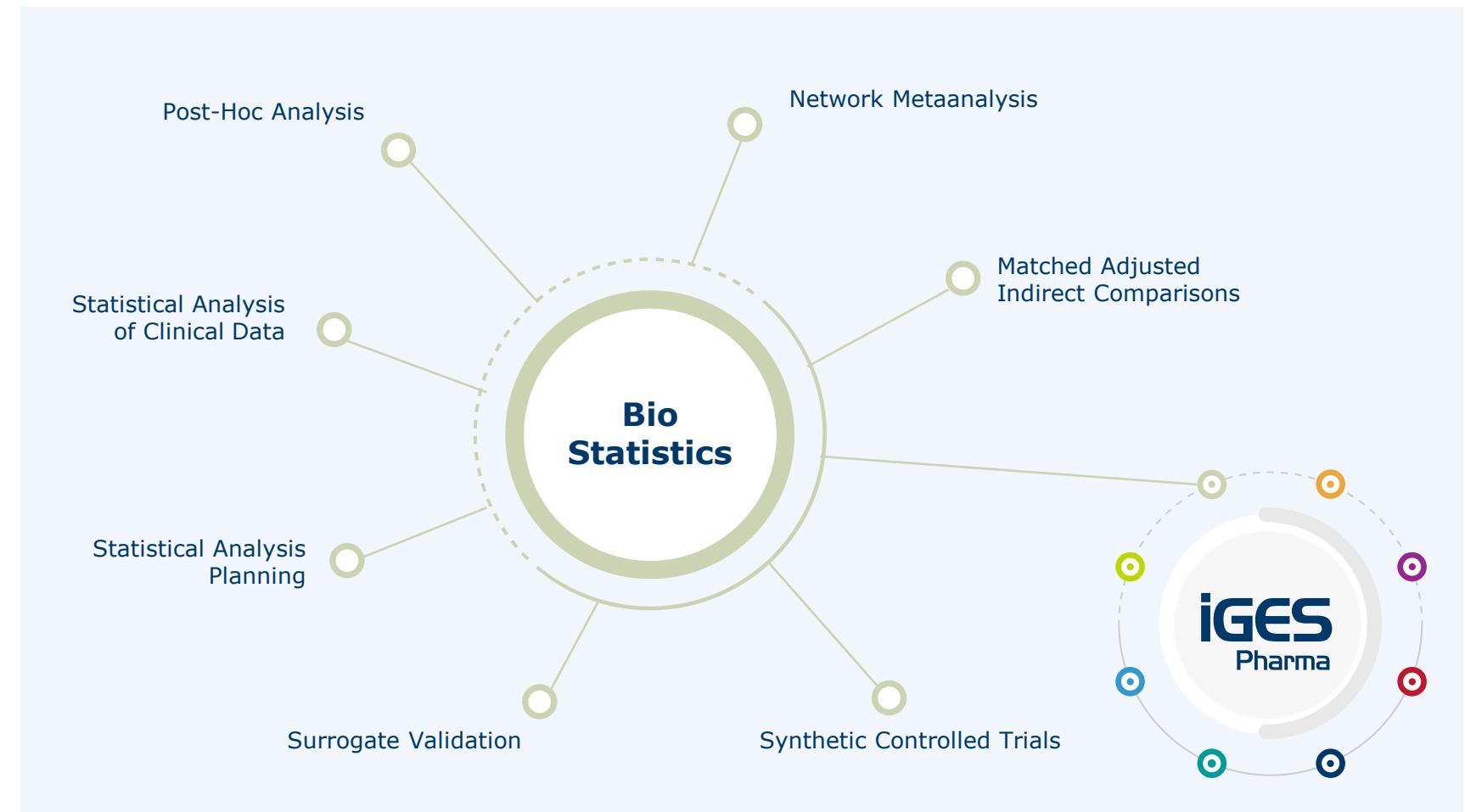
We can advise you on the appropriate quantitative or qualitative methodological approach, guide you to suitable data or even provide you with our own data collection. Project results may be published, for example, in the form of scientific publications, expert opinions and white papers; also, to promote dialogue and debate on conceptual and normative issues related to health and health care. They can also be utilized for internal strategy shaping to allow for key decisions to be based on robust information.



# Core Capabilities - Biostatistics

## Biostatistics

IGES operates its own in-house biostats team which is well experienced in the statistical analysis around the launch of innovative pharmaceuticals. Provided with the clinical trial data our team can perform the necessary post-hoc analysis for local HTA submission as well as network meta-analysis, indirect comparisons, or surrogate validations.



# Solutions – Market Access Strategy

## Market Access Strategy

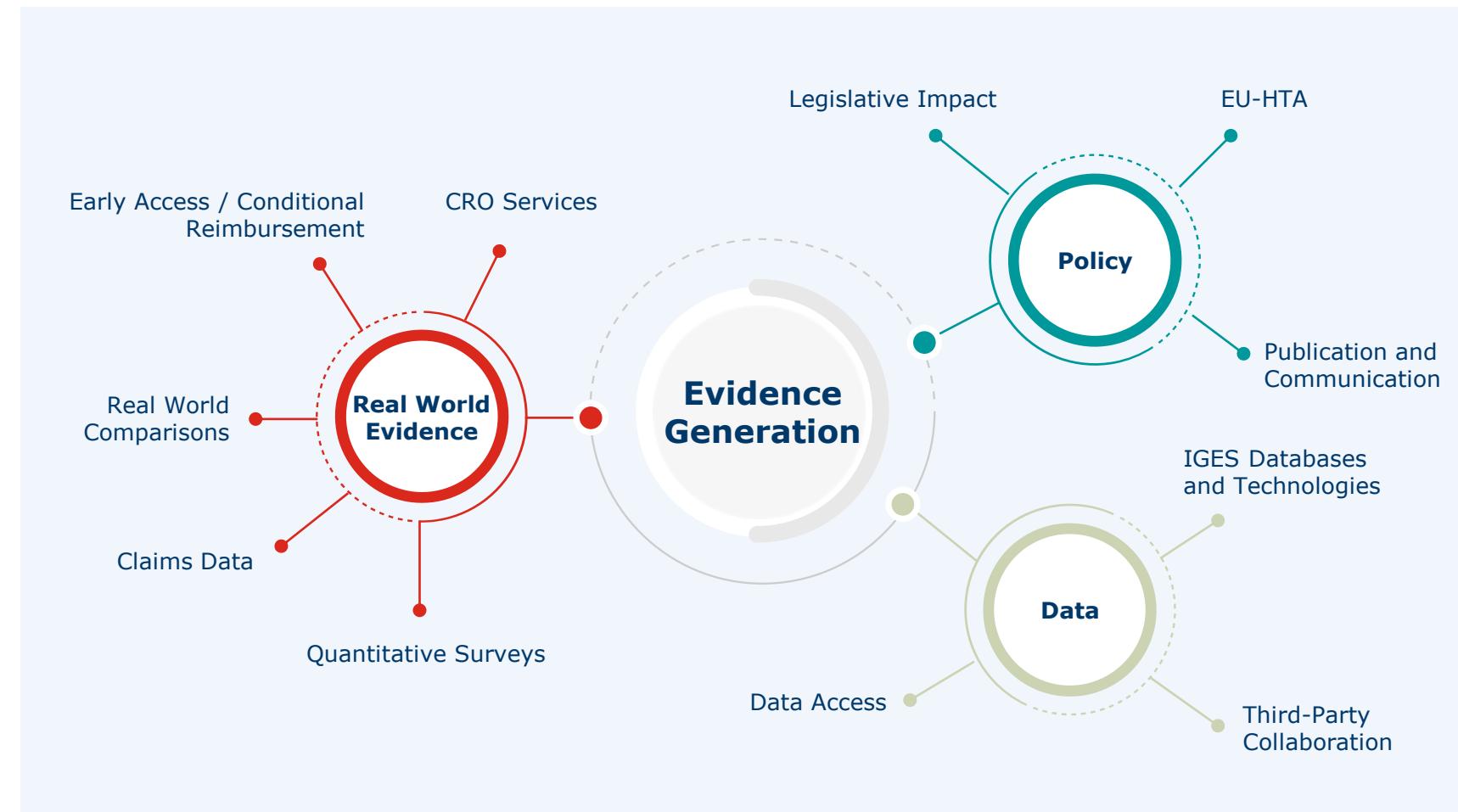
IGES with its vast experience in the realm of Market access can support your product from cutting through the complexity. We work with our clients every step of the way from shaping evidence generation programs to meet European HTA requirements to accurately assessing the commercial potential of assets and continuously optimizing market access strategy towards a products launch and beyond. Since IGES supports operationally along the whole Market Access process chain, we know what matters when deciding for scenarios and making crucial business decisions.



# Solutions – Evidence Generation

## Evidence Generation

The collection of RWE may be facilitated as a proactive activity to enrich your HTA application or reactively as a requirement from local HTA process. In both cases, IGES can support in collecting RWE with its in-house CRO and Biostats team: from study conceptualization, study site recruitment, data collection, biostatistical analysis to result presentation and submission in HTA processes. Due to its unique positioning as a trusted partner of all major stakeholders of the healthcare system, IGES also supports its clients with policy advice and communication in the realm of evidence generation. While there is never an out-of-the box solution for any product, some innovations require early dialogue with payers, providers, and policy-makers more than others. IGES looks back on a strong experience in contributing to the evolution of HTA and data generation frameworks.



# Solutions – EU-HTA

## EU-HTA

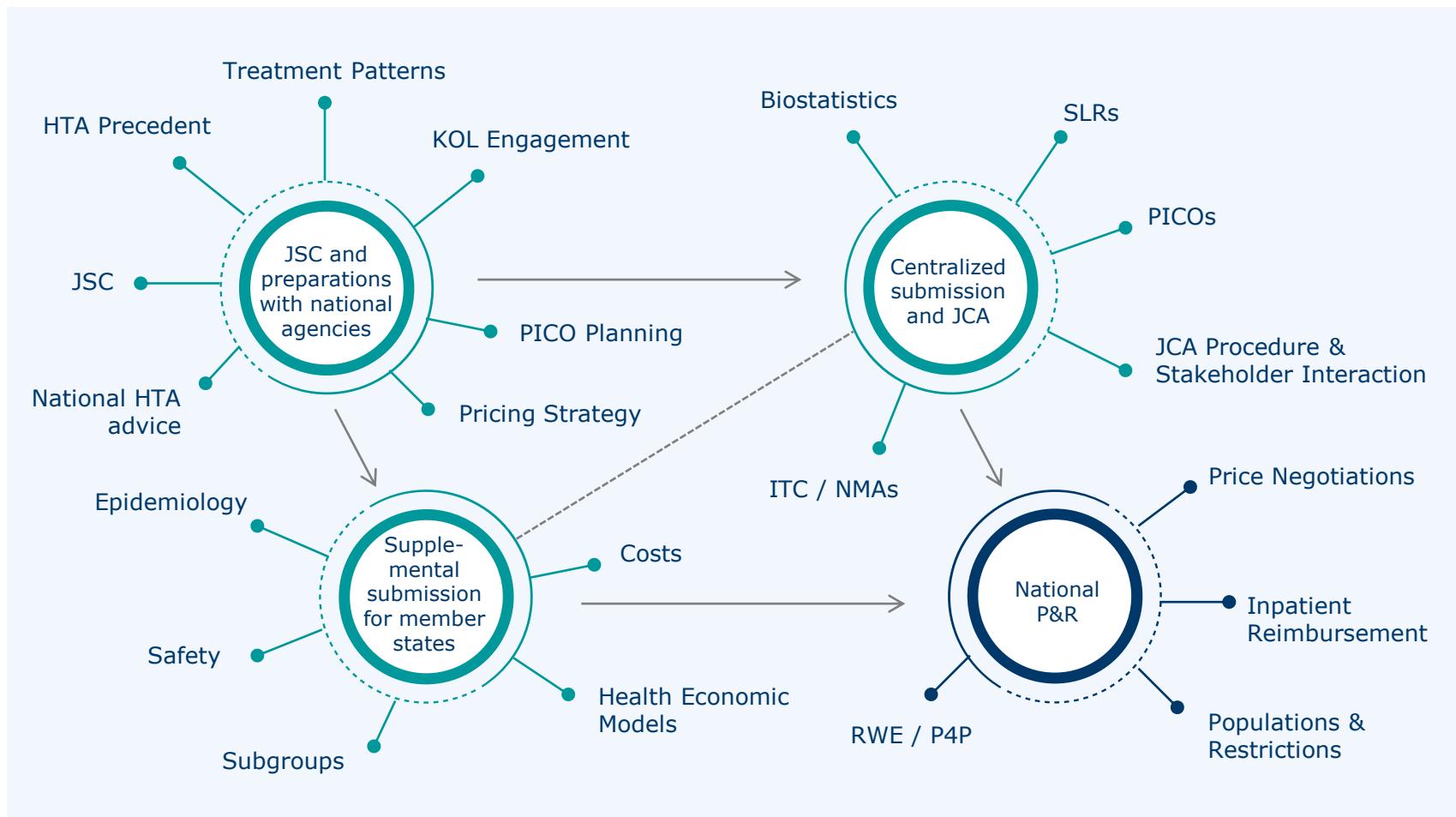
Navigating the harmonized European HTA framework that will be applied in stages starting in 2025 will be a significant challenge for all stakeholders.



# Solutions – EU-HTA

## EU-HTA

Navigating the harmonized European HTA framework that will be applied in stages starting in 2025 will be a significant challenge for all stakeholders. While there will be a centralized clinical assessment, member States remain responsible for defining Populations, Comparators, and Outcomes (PICOs) as well as all decisions on Pricing & Reimbursement. The resulting process is a hybrid system requiring perfectly aligned national and central activities.



# **IGES Pharma Asset Valuation Approach across EU**

# Why asset valuation matters

Strategic market intelligence for informed decision-making

How many patients are eligible for drug treatment?



Asset Value

Volume



Price



What's a robust price estimate for the drug?

Will the drug get reimbursement?

➡ In-licensing

»»» Strategic Portfolio Decisions

»»» Business Calculations

»»» Market Access Planning

➡ Out-licensing

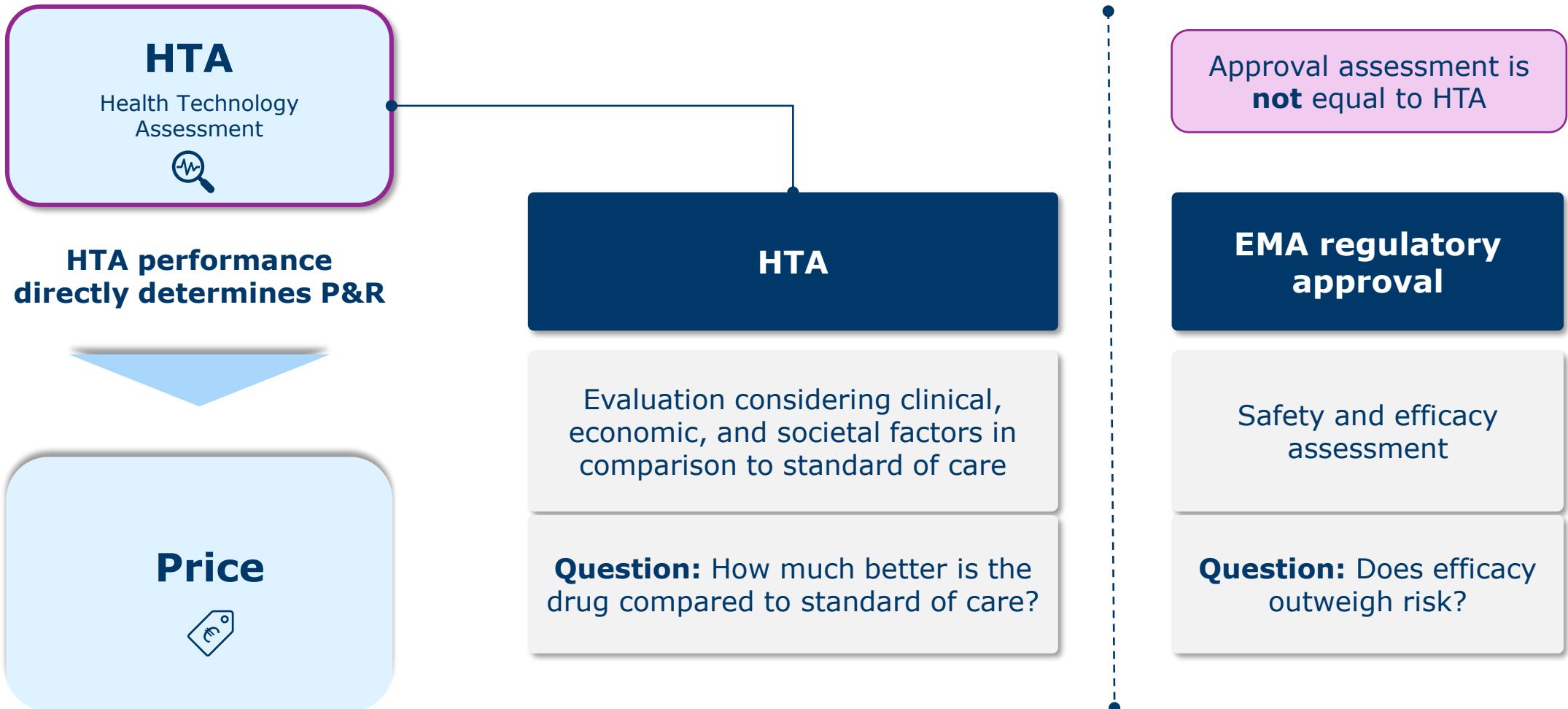
»»» Clinical Development Optimization

»»» Partnering Discussions

»»» Licensing Conditions

# HTA does matter in Europe

In Europe: P&R based on HTA performance



# Valuation process

## HTA and pricing components

### 1 HTA appraisal



#### Product label

- Is the starting point for all HTA processes



#### Clinical data package

- Your clinical data will be compared against your label you aspire



#### Performance

- Will be determined based on fit of product label with data package



### 2 Impact on pricing



#### Payer research



#### Research on pricing analogues



#### Mapping of potential reimbursement restrictions



#### Epidemiology of label population



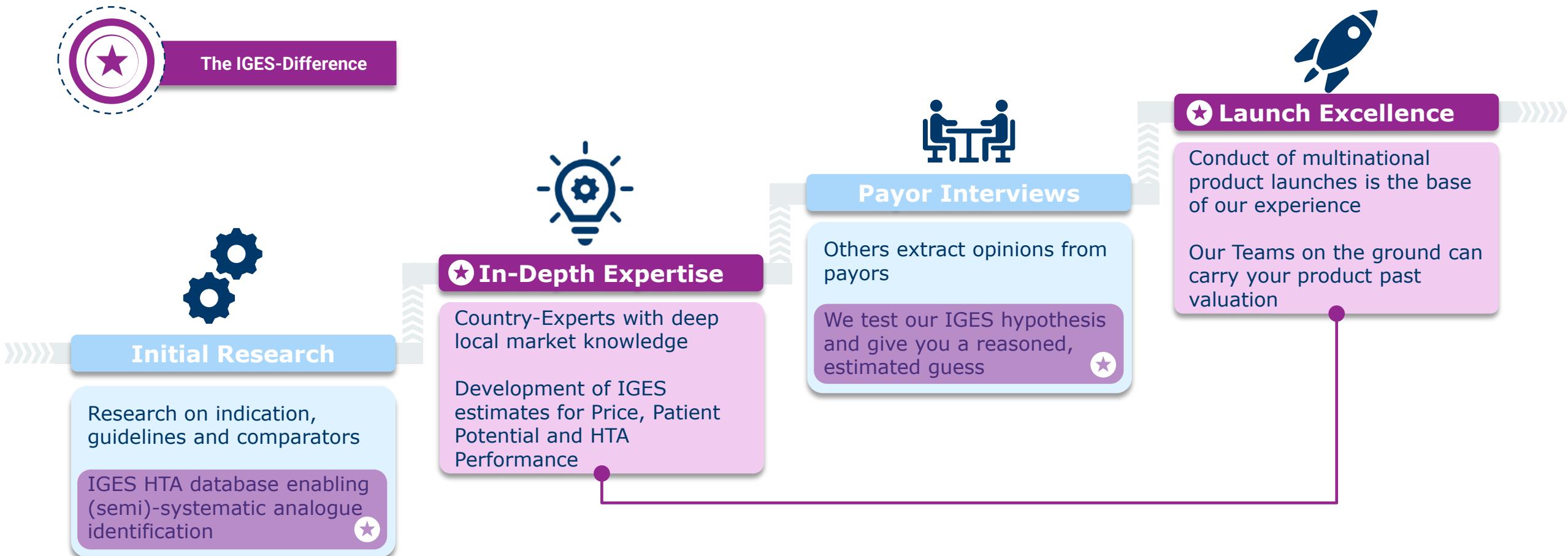
Estimate on: HTA Performance



Estimate on: Price & Patient Potential

# Why do we differ? GLOCAL!

## Local Expertise with Global Messaging



# Five Markets – One Team – One point of contact

## Streamlined Expertise across EU5



### Dedicated project leadership

- Ensures consistent communication
- Provides streamlined project coordination
- Delivers consolidated insights



### Local country experts

- Deep market knowledge
- Local HTA & pricing and reimbursement expertise



### Consolidated deliverable

- One comprehensive report
- Synthesized findings across all markets
- Actionable recommendations
- Comparative pricing opportunity assessment



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