The FH Approach

- a conversation we have with our clients

What is your goal for the year?	DEFEND	MAINTAIN	GROW
Product	I need to defend	I need to maintain my license	I need to introduce a new
	my product	to operate	product on the market
Organisation or	I need to defend	I need to communicate	I need to raise
Country	my reputation	and align internally	my profile
Marketplace	I need to defend my commercial freedom	I need to shape a business-friendly environment	I need to access new markets

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Our Brussels clients past and present:































Healthcare Practice

FH Health Team









"Health is a value in itself"

It improves the lives of citizens, drives economic prosperity and brings about societal developments- and yet tighter budget constraints, compounded by socio-economic trends, are putting pressure on Europe's health systems.

Will cuts to healthcare lead to longer term problems or will a solution be found in time to create 'modern, responsive and sustainable health systems'

THE RIGHT TO RECIEVE

Healthcare services are a right for all EU citizens per a 2006 European Court of Justice ruling, enforcing the EU to work to an even quality of healthcare across the EU

ECONOMIC GOVERNANCE

The financial crisis expanded the

intervening in healthcare systems

management

EU's role in controlling member states' public spending, including



Health as a share of total government spending is falling, with the largest falls

1% fall

of around 1%. (WHO Europe)

ECONOMICS IS DRIVING HEALTH POLICY

- → The financial crisis has compounded constrained budget resources.
- → Declining health budgets driving generic substitution and price cuts for pharmaceuticals
- ▶ Increased international reference pricing, parallel trade, &health technology assessment
 - → Co-payment & industry paybacks on the table
 - → Investment plans on hold



10-20% of total expenditures

Medicines account for only 10-20 per cent of total

expenditures*



INCREASING REACH OF BRUSSELS INTO DOMAINS TRADITIONALLY HELD BY MEMBER STATES

WHERE THE EU IS **LOOKING TO MAKE A** DIFFERENCE

- Driving competitiveness, and investing in research and innovation
- → Recommendations for modern. responsive and sustainable health systems
- ▶ Tackling chronic diseases
- → Promoting active and health ageing
- → Improving access to healthcare interventions and protecting patient safety
 - → Greater disease prevention and health promotion



- → People are getting older, and living longer. Resulting rise in chronic conditions: with the EU prioritising cancer, diabetes, cardiovascular & respiratory disease
- → Technological developments continue to come to the fore
 - → Increasing access to information is driving consumer expectations





75% =€ 700 billion

Around 75% of Europe's healthcare bill is on chronic diseases = €700 billion (DG SANCO)

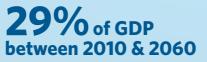
Case Studies:

DISEASE AWARENESS DRIVING NATIONAL POLICY

BLOGGING ON EU HEALTHCARE ISSUES

ADDRESSING TRUST OF THE PHARMACEUTICAL SECTOR

PATIENT ADVOCACY **ON BIOSIMILARS**



Age-related public expenditures (pensions, health-care and longterm care) projected to increase by 4.1 % to around 29% of GDP between 2010 and 2060 (DG ECFIN)