

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 my product	I need to maintain my license to operate	I need to introduce a new product on the market
Organisation or Country	I need to defend my reputation	I need to communicate and align internally	I need to raise 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 EU's role in controlling member states' public spending, including intervening in healthcare systems management



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



 **1% fall**

Health as a share of total government spending is falling, with the largest falls of around 1%. (WHO Europe)

INCREASING REACH OF BRUSSELS INTO DOMAINS TRADITIONALLY HELD BY MEMBER STATES

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 DEMAND AND COSTS FOR HEALTHCARE

- 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

29% of GDP
between 2010 & 2060

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



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

FleishmanHillard supported the launch of a high-level national policy roundtable gathering patient groups, academics, policy and political stakeholders to address Hepatitis C in Europe. By bringing the debate to the national level, the roundtables allow national authorities to share innovative and best practice public health strategies to inform their national strategies. This model was subsequently endorsed by national actors who organised a follow-up roundtable.

BLOGGING ON EU HEALTHCARE ISSUES

FleishmanHillard supported Lilly in the strategic development and creation of the first EU level pharma blog (Lillypad) and Twitter account on health policy initiatives and issues. We developed an editorial calendar, identifying relevant issues and key angles to drive traffic to the blog.

ADDRESSING TRUST OF THE PHARMACEUTICAL SECTOR

FleishmanHillard supported Janssen in engaging stakeholders on issues impacting on trust and reputation of the pharmaceutical industry. The project involved the development of a report based on conversations with a global range of high-level stakeholders from the political life, civil society, business and media worlds on the reputation of the pharmaceutical industry. Subsequently, FleishmanHillard organised a high-level roundtable in London for the Janssen European CEO, where participants had a constructive and frank debate on ways to shape the future of the pharmaceutical sector's reputation in Europe.

PATIENT ADVOCACY ON BIOSIMILARS

With the biosimilars becoming more prevalent in Europe, FleishmanHillard supported Amgen with the organisation and moderation of patient workshops to assess positions and educate on safety challenges of biosimilars.