MARKETING INSIGHT CONTINUED

claim to be patient-focused. Swiss health professional societies are often members of European health professional societies and receive news and information through their European counterparts.

Switzerland has a large choice of public relations and marketing consultancies. The major multinational agencies have offices in Switzerland, either in Geneva or Zurich or both, and some are building specific healthcare practices. Local agencies work as either fully staffed structures or within formal and informal networks, and constitute a rich and highly qualified workforce. LinkedIn and other social networking sites are also changing the landscape of how business is done. Because Switzerland is a small market in comparison with some other European markets, the Swiss subsidiaries of multinational pharmaceutical companies are sometimes tied in to using global agencies, which may not have the local and specialised knowledge that smaller, local boutique agencies have.

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ACCESS TO MARKET

The Swiss market is often rated as complex because of the existence of multiple languages and its strong federalist system. However, the importance of the local pharmaceutical industry for the overall economy has created favourable market access conditions for pharmaceutical products.

The central Swiss supervisory authority for therapeutic products authorisation is Swissmedic which is affiliated to the Department of Home Affairs. Swissmedic operates in accordance with international licensing criteria, but decisions can differ from those of the EMEA or the FDA.

The normal review period takes 200 days and there is a 130-day, fast-track procedure, which has often resulted in drugs being available before other European countries. Recently, however, Swissmedic has struggled to meet these timelines. A task force dedicated to reviewing currently pending registrations by 2010 has been launched this year.

APPROVAL PROCESS

Once a drug is approved, a reimbursement dossier can be submitted to the Federal Office of Public Health (FOPH). There is no institutionalised Health Technology Assessment (HTA) body such as NICE (UK) or IQWiG (Germany), but experts such as the SNHTA (Swiss Network of Health Technology Assessment) are involved when necessary.

The dossier is reviewed by the federal Commission for Medicines (FCM) on behalf of the FOPH. If reimbursement is granted, the compound is included in the national reimbursement catalogue. Pricing decisions by the FOPH are based in relation to other compounds and in reference to other European countries, with Germany, Denmark, the Netherlands and the UK being the primary reference markets. If evidence is provided for the innovative value of a medicine, a premium of 10-20 per cent can be obtained.

Santésuisse (the national association of health insurers) and the Federal Department of Home Affairs are pursuing an aggressive agenda of monitoring and reducing prices. There are regular price reviews to readjust prices to European levels.

Despite these measures, prices for innovative drugs are still on average 7 per cent higher than in the official price comparison markets and around 17 to 25 per cent higher than in neighbouring countries, Austria, France and Italy. Yet, recent legislative decisions on parallel imports exclude pharmaceuticals from a general opening of the marketplace to cheaper imports, preserving the relatively high drug prices in Switzerland for the time being.

INTERACTION WITH DOCTORS

There are two distinct features of the interaction between pharmaceutical companies and the 15,600 doctors in Switzerland.

First, about 25 per cent of pharmaceutical sales originate from self-dispensing (SD) doctors – mostly GPs in rural areas with a low density of pharmacies. Access to these doctors has traditionally been very good, but the substantial drug-related revenues for SD-doctors are generating political pressure for tighter regulation.

Second, Swiss doctors are generally visited by pharmaceutical sales representatives at a lower frequency than in the rest of Europe (only about three times per year) but the duration of these visits is longer (20–30 minutes). This enables a more qualitative and relationship-driven interaction. However, doctors are starting to restrict their accessibility through services such as *Docbox*, a web-based platform to manage appointments. Unless pharmaceutical companies find ways to add more value to doctors, this trend is likely to continue.

STRATEGY FOR THE FUTURE

By international comparison, access to the Swiss market is attractive. Market approval can be obtained in a reasonable timeframe, pricing is advantageous and the pharmaceutical industry has a strong foothold in the healthcare system. As such, the country remains a pilot market for prescription products in Europe.

However scrutiny on price and the price-value ratio is increasing. As elsewhere, market access is becoming a topic of strategic relevance for pharmaceutical companies. Leveraging the current favourable climate by investing in understanding the HTA environment and building relationships at all levels are the prerequisites to ensure future market access and success.

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