



World Markets Pricing and Reimbursement

Connect™ User Guide

Table of Contents

- [Connect Login Instructions](#)

- [Life Sciences Menu](#)
 - > [Global Coverage](#)
 - > [Headline Analysis](#)
 - > [Market Access Risk Scores](#)
 - > [IRP Matrix](#)
 - > [Risk-Sharing Database](#)
 - > [Pricing and Reimbursement Policy Database](#)

- [Geography Menu](#)

- [My Connect](#)
 - > [Email Notifications](#)
 - > [Saved Content](#)
 - > [Report Builder](#)

- [User Options](#)

- [Contact Us](#)

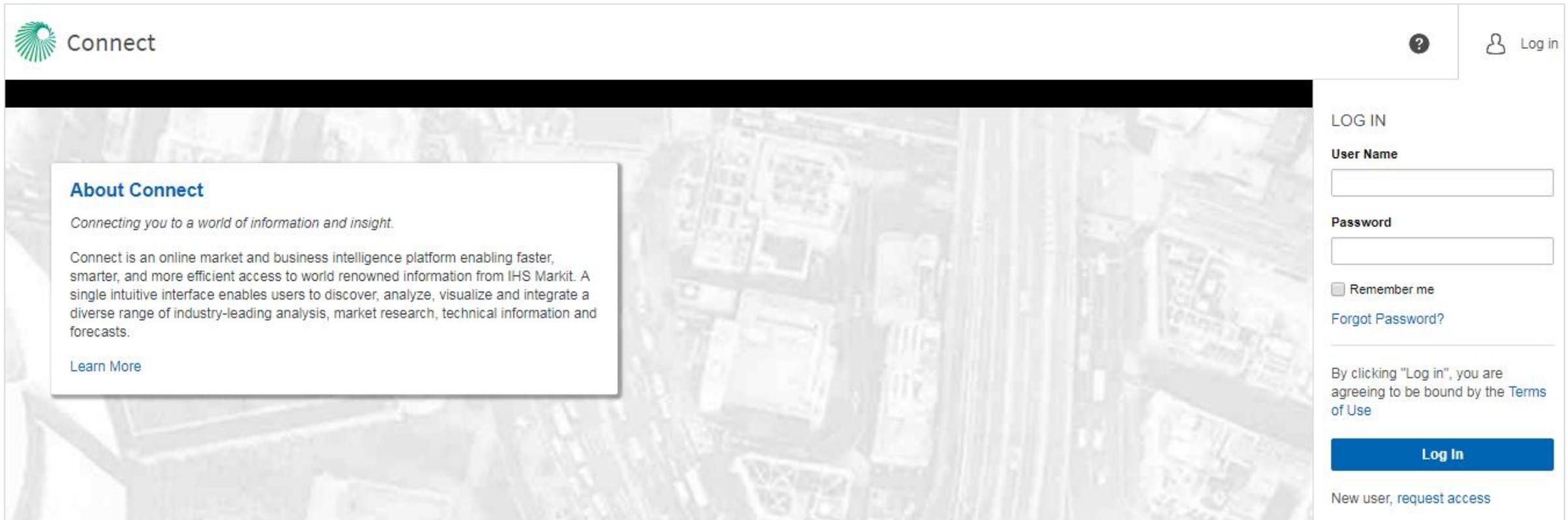


Connect Login Instructions

Connect Login Instructions

Go to connect.ihsmarkit.com and log in with your Username and Password.

Click on 'Forgot Password?' to reset your password.



The screenshot shows the Connect login interface. On the left, there is a navigation menu with the 'Connect' logo and a 'Log in' button. The main content area features an 'About Connect' section with a description of the platform and a 'Learn More' link. On the right, the login form is displayed, including fields for 'User Name' and 'Password', a 'Remember me' checkbox, a 'Forgot Password?' link, and a 'Log In' button. A disclaimer states that clicking 'Log In' implies agreement to the Terms of Use. A link for 'New user, request access' is located at the bottom of the login form.

 Connect ?  Log in

About Connect

Connecting you to a world of information and insight.

Connect is an online market and business intelligence platform enabling faster, smarter, and more efficient access to world renowned information from IHS Markit. A single intuitive interface enables users to discover, analyze, visualize and integrate a diverse range of industry-leading analysis, market research, technical information and forecasts.

[Learn More](#)

LOG IN

User Name

Password

Remember me

[Forgot Password?](#)

By clicking "Log in", you are agreeing to be bound by the [Terms of Use](#)

Log In

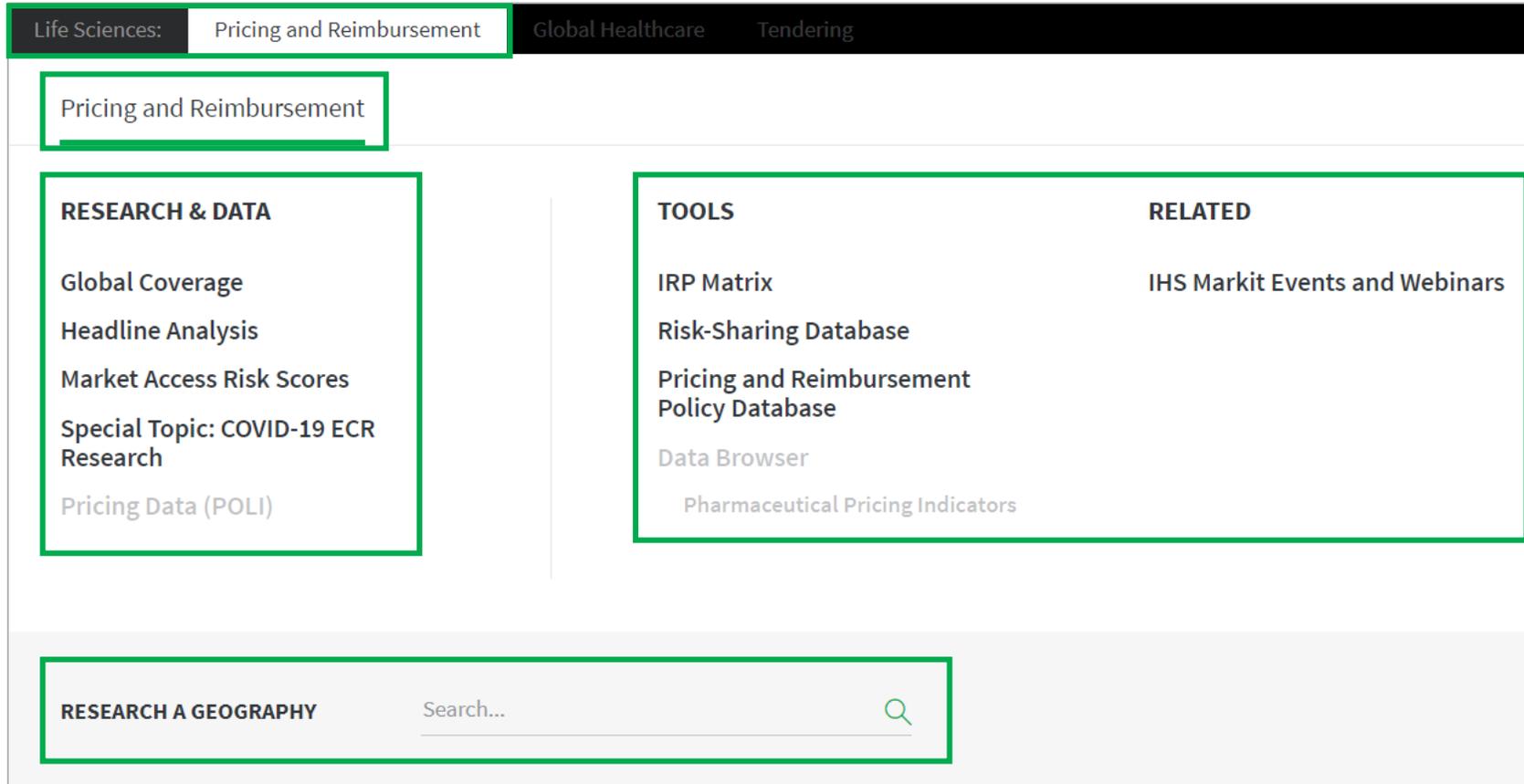
[New user, request access](#)



Life Sciences Menu

Life Sciences Menu Navigation

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement**



RESEARCH & DATA: Quick access to pricing and reimbursement analysis and risk scores.

RESEARCH A GEOGRAPHY: Direct access to a Country/Territory page.

Quick access to relevant **Data Tools, Related Resources** and **Events**.

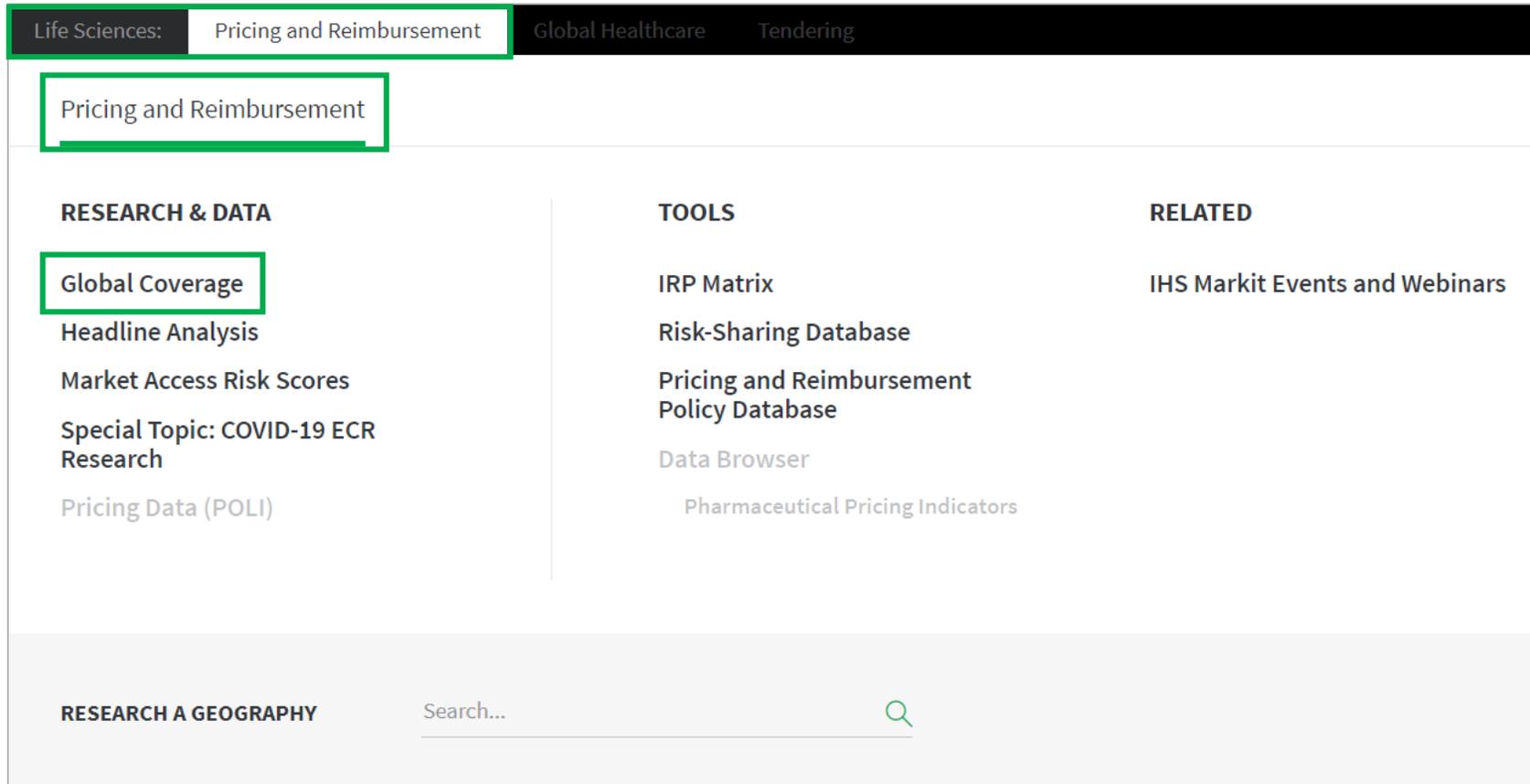
Menu options will appear based on the user's access or company subscription.



Global Coverage

Global Coverage Navigation

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement** > **Global Coverage**



The screenshot displays a navigation menu with a black header bar containing the following items: Life Sciences, Pricing and Reimbursement, Global Healthcare, and Tendering. The 'Pricing and Reimbursement' item is highlighted with a green box. Below the header, a dropdown menu is visible, with 'Pricing and Reimbursement' at the top, also highlighted with a green box. Underneath, the menu is organized into three columns: 'RESEARCH & DATA', 'TOOLS', and 'RELATED'. In the 'RESEARCH & DATA' column, 'Global Coverage' is highlighted with a green box. Other items in this column include 'Headline Analysis', 'Market Access Risk Scores', 'Special Topic: COVID-19 ECR Research', and 'Pricing Data (POLI)'. The 'TOOLS' column lists 'IRP Matrix', 'Risk-Sharing Database', 'Pricing and Reimbursement Policy Database', and 'Data Browser' (with 'Pharmaceutical Pricing Indicators' as a sub-item). The 'RELATED' column contains 'IHS Markit Events and Webinars'. At the bottom of the menu, there is a 'RESEARCH A GEOGRAPHY' section with a search bar containing the text 'Search...' and a magnifying glass icon.

Menu options will appear based on the user's access or company subscription.



Global Coverage - 1

Follow market, policy and pricing developments worldwide and access all our latest content. Interactive charts and tables highlight key data and indicators.

HOT TOPICS: Topical reports including Market Access Month Ahead published at the end of each month covering an overview of critical P&R reforms, public consultations and HTA.

Headline Analysis: comprehensive coverage of market, policy and pricing developments. Click **More Headline Analysis** to see full list and filter options.

Pharmaceutical Price Trends: Chart to compare price trends. Geographies shown can be customized.

Special Reports: in-depth analysis of major themes.

The screenshot displays the IHS Markit website interface with several key sections highlighted by green boxes:

- HOT TOPICS:** A row of five article thumbnails with titles like "COVID-19 vaccines advanced purchase agreements tracker", "Market Access Month Ahead: September", "IRP introduction in the US", "Challenging the PMPRB reforms", and "Containing the COVID-19 virus threat".
- Featured Headlines:** A grid of four article snippets, including "Pharmacy drug expenditure in Portuguese public sector grows 3.5% in H1" and "Japan's MHLW discusses evolution of policy for 'special-use drugs'".
- Headline Analysis:** A list of three featured articles with titles such as "Pharmacy drug expenditure in Portuguese public sector grows 3.5% in H1" and "Japan's MHLW discusses evolution of policy for 'special-use drugs'".
- Pharmaceuticals Price Trends:** A bar chart titled "Pharmaceuticals Price Trends, 2015-19" showing average price changes for Branded (Patent-Protected) and All drugs across Germany, Spain, Japan, Australia, and United Kingdom.
- SPECIAL REPORTS:** A section with three report cards, including "P&R events bulletin: September 18 Sep 2020" and "Southeast Asia's evolving P&R policies and their implications for the pharma sector".
- Research and Data Center:** A sidebar on the right containing a "COVID-19 Update calls" registration box, a "Market Access Risk Update" archive, and navigation buttons for "Go to IRP Matrix", "Go to Policy Database", and "Go to Risk-Sharing Database".
- Service Bulletins:** A list of recent updates, including "Market Access Month Ahead: September 2020" and "IHS Markit lowers the global level of risk in Q2 2020 MARS update".
- Methodology and Events:** A bottom sidebar with links to "Methodology" and "IHS Markit Events".

Research and Data Center: key global overview files.

IRP Matrix: Interactive matrix and map.

Policy Database: Compare P&R policies across geographies.

Risk Sharing Database: risk-sharing agreements between healthcare payers and pharma manufacturers.

Service Bulletins: Information about your services and IRP updates.

Methodology files and IHS Markit Events.

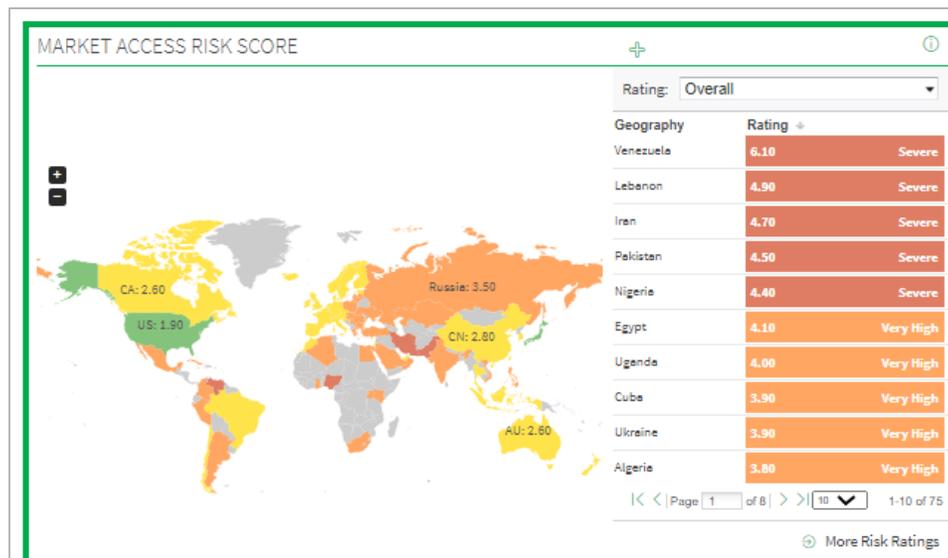


Global Coverage - 2

Market Access Risk Scores:

Zoom and pan map, navigate to country/territory pages. Use ranking table to compare geographies.

More Risk Ratings opens full Risks and Ratings interface to view all geographies, export.



Risk Sharing:

Latest agreements and interactive database access.



The figure shows a screenshot of the 'Latest Risk-Sharing Agreements' table. It lists recent agreements with columns for Date, Market, Drug, Company, and Type of Risk Share.

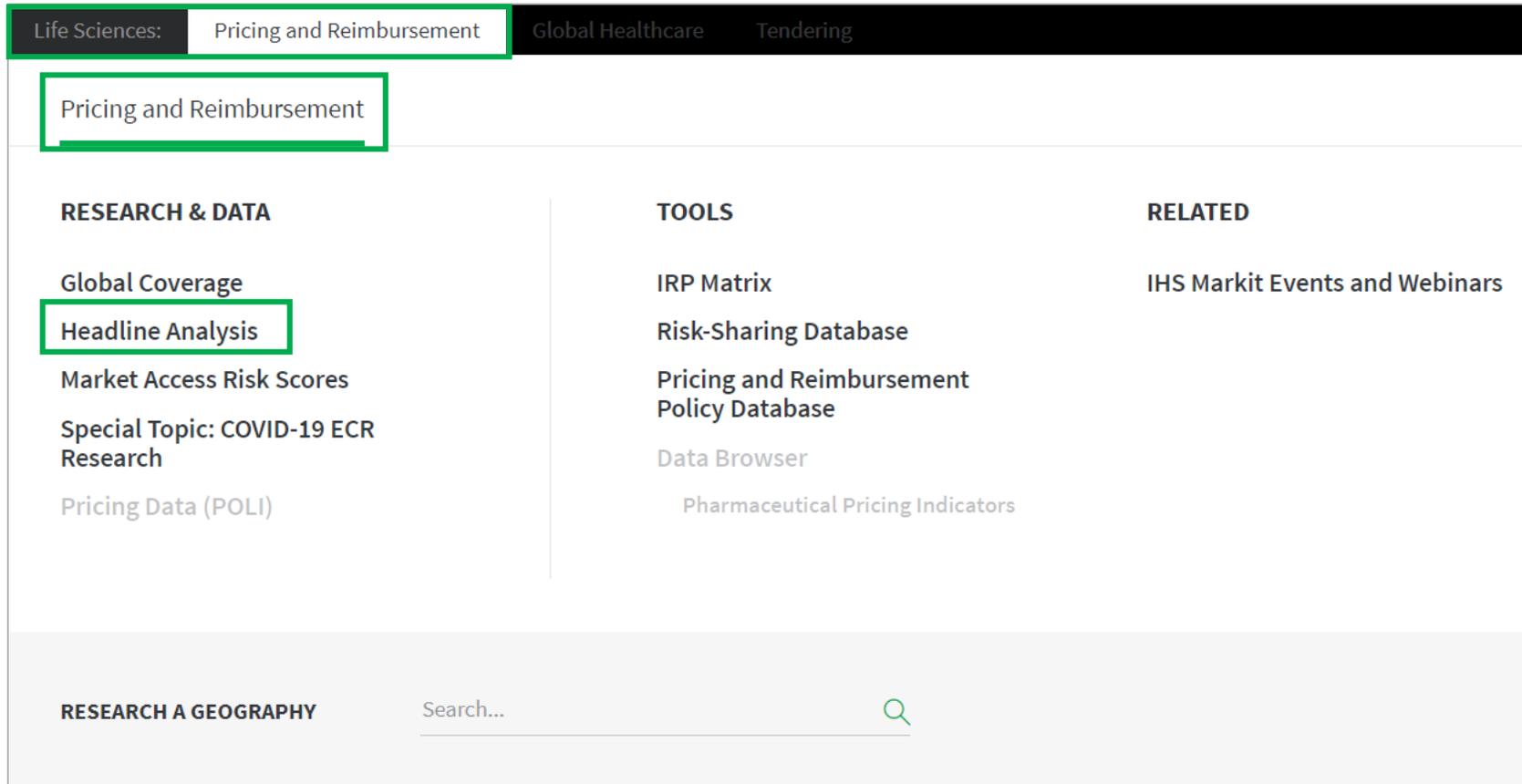
Date	Market	Drug	Company	Type of Risk Share
1 Aug 2020	United Kingdom	Rozlytrek	Roche	Finance-based
1 Aug 2020	United Kingdom	Rozlytrek	Roche	Finance-based
1 Aug 2020	United Kingdom	Nerlynx	Pierre Fabre	Finance-based
1 Aug 2020	United Kingdom	Adcetris	Takeda Pharmaceutical	Finance-based
1 Aug 2020	United Kingdom	Xospata	Astellas	Finance-based



Headline Analysis

Headline Analysis Navigation

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement** > **Headline Analysis**



The screenshot shows a navigation menu with a black header bar containing the following items: Life Sciences, Pricing and Reimbursement, Global Healthcare, and Tendering. The 'Pricing and Reimbursement' item is highlighted with a green box. Below the header, a dropdown menu is visible, with 'Pricing and Reimbursement' at the top, also highlighted with a green box. Underneath, the menu is organized into three columns: RESEARCH & DATA, TOOLS, and RELATED. In the RESEARCH & DATA column, 'Headline Analysis' is highlighted with a green box. Other items in this column include Global Coverage, Market Access Risk Scores, Special Topic: COVID-19 ECR Research, and Pricing Data (POLI). The TOOLS column lists IRP Matrix, Risk-Sharing Database, Pricing and Reimbursement Policy Database, and Data Browser (with Pharmaceutical Pricing Indicators as a sub-item). The RELATED column lists IHS Markit Events and Webinars. At the bottom of the menu, there is a 'RESEARCH A GEOGRAPHY' section with a search bar containing the text 'Search...' and a magnifying glass icon.

Menu options will appear based on the user's access or company subscription.



Headline Analysis

All headline analysis articles are organized in a reversed chronological order.

Keyword search and relevant filter options.

The screenshot displays the IHS Markit Headline Analysis interface. On the left, a navigation sidebar shows 'Life Sciences' with sub-sections for 'Headline Analysis', 'All Headlines', 'Pricing and Reimbursement', and 'My Saved'. A 'Filters' panel is open, showing 'GEOGRAPHY' (Africa, Americas, etc.) and 'LIFE SCIENCES CATEGORY' (Sector, Therapeutic Area, Topic). A search bar contains the keyword 'FDA'. The main content area shows 'Results (1,048)' with a 'FOLLOW THIS' button highlighted. A 'Follow this Query' dialog box is open, allowing users to name the search, choose a destination folder, and select an email notification frequency (Daily, Immediate, or Weekly). A 'Save to My Connect' dialog box is also visible at the bottom.

Select **Follow This**, name the search, specify the folder to save the search. Select your preferred alert frequency to set up an email alert.

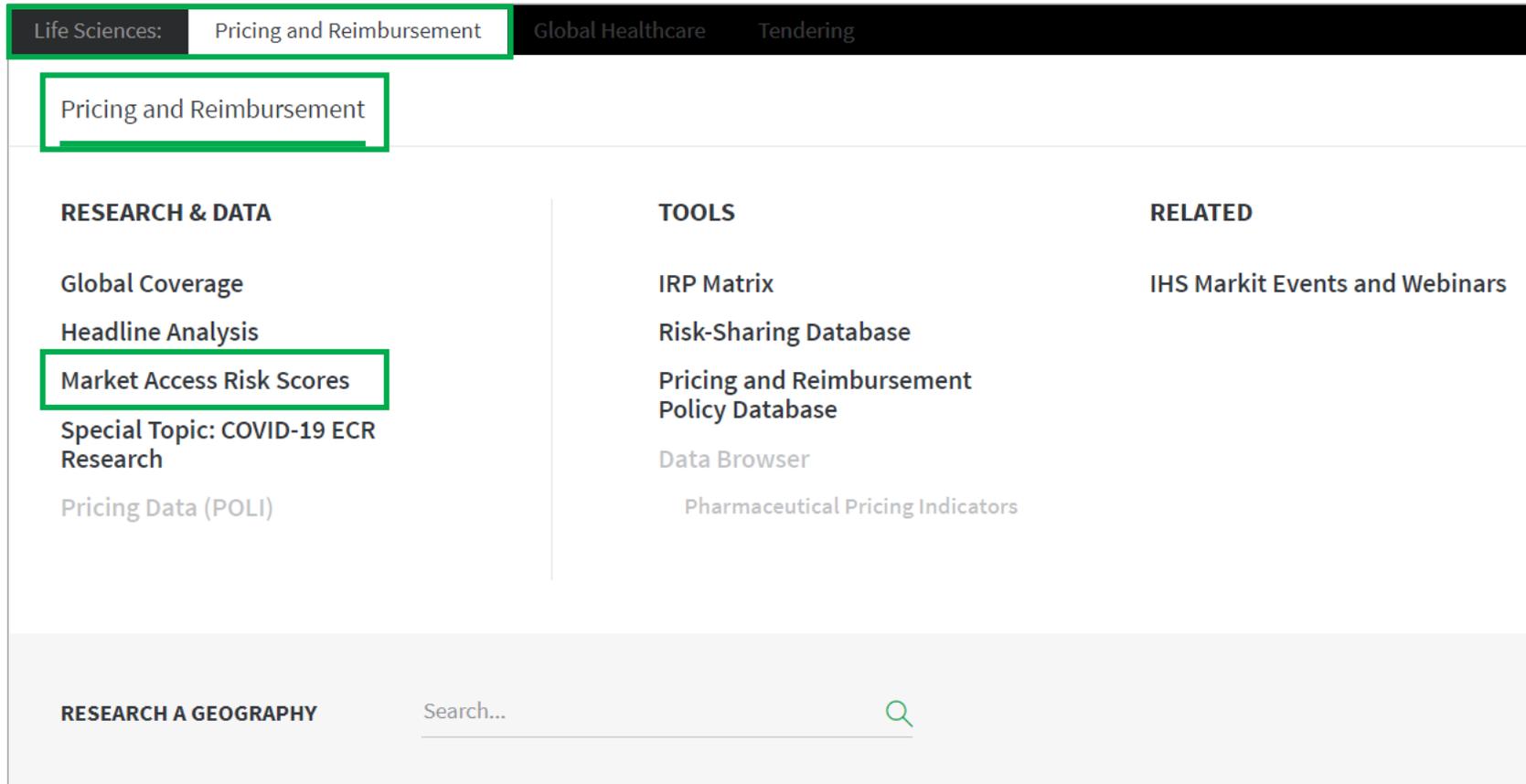
Click on icon and save multiple headline analysis to My Connect to build a custom report. ([Slide 33](#))



Market Access Risk Scores

Market Access Risk Scores Navigation

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement** > **Market Access Risk Scores**



The screenshot shows a navigation menu with a black header bar containing the following items: Life Sciences: Pricing and Reimbursement, Global Healthcare, and Tendering. The 'Pricing and Reimbursement' item is highlighted with a green box. Below the header bar, a dropdown menu is displayed with the following sections:

- RESEARCH & DATA**
 - Global Coverage
 - Headline Analysis
 - Market Access Risk Scores** (highlighted with a green box)
 - Special Topic: COVID-19 ECR Research
 - Pricing Data (POLI)
- TOOLS**
 - IRP Matrix
 - Risk-Sharing Database
 - Pricing and Reimbursement Policy Database
 - Data Browser
 - Pharmaceutical Pricing Indicators
- RELATED**
 - IHS Markit Events and Webinars

At the bottom of the menu, there is a search bar with the text 'RESEARCH A GEOGRAPHY' and a search icon.

Menu options will appear based on the user's access or company subscription.



Market Access Risk Scores

Explore market access risk ratings with an interactive tabular/map interface. Customize the league table, save your settings, see changes over time, view related content. Access from menu and from risk modules on global and country/territory P&R pages.

Toggle between **Table** and **Map** forms.

Use time slider to see risk evolution.

Click plus sign under column headers to show component ratings. Click headings for custom sort.

Overall	Quantitative Measures	Qualitative Measures	Other Risk Scores	Event Driven Measures
3.00	5.30	1.84	1.94	3.05



Profiles to save your selections and recall saved selections.

Export the table to Excel or chart to image.

Methodology via icon.

Geography: Filter the table by regions/geographies.

Click on geography name to open information panel on right. This shows risk history chart and related content.

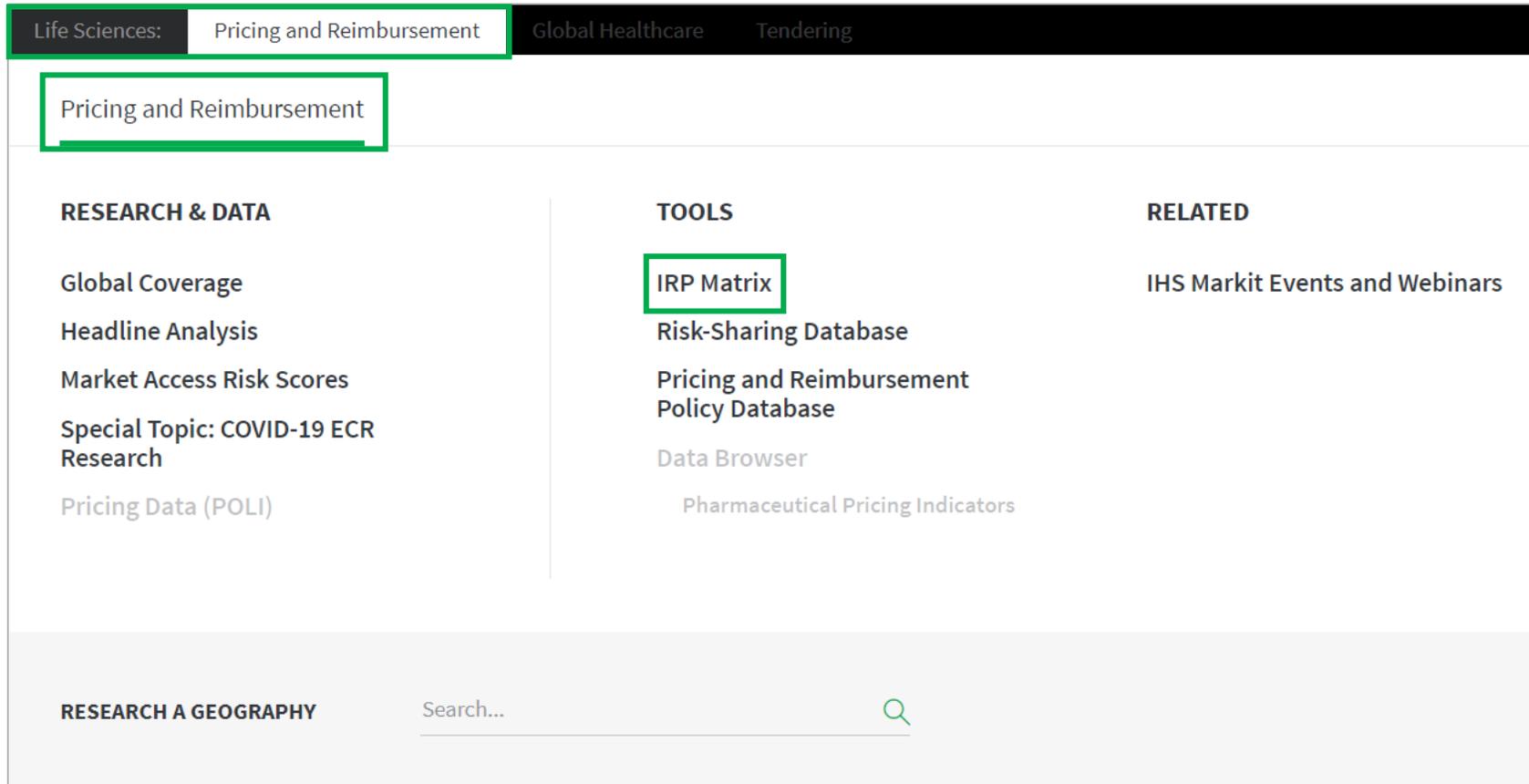
Rating Category: Change rating shown on map.

Click on the geography shape to open information panel on right.

IRP Matrix

IRP Matrix Navigation

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement** > **IRP Matrix**



The screenshot shows a navigation menu with a black header bar containing the following items: Life Sciences, Pricing and Reimbursement, Global Healthcare, and Tendering. The 'Pricing and Reimbursement' item is highlighted with a green box. Below the header, a dropdown menu is visible, also with 'Pricing and Reimbursement' highlighted in green. This dropdown menu is organized into three columns:

- RESEARCH & DATA**
 - Global Coverage
 - Headline Analysis
 - Market Access Risk Scores
 - Special Topic: COVID-19 ECR Research
 - Pricing Data (POLI)
- TOOLS**
 - IRP Matrix (highlighted with a green box)
 - Risk-Sharing Database
 - Pricing and Reimbursement Policy Database
 - Data Browser
 - Pharmaceutical Pricing Indicators
- RELATED**
 - IHS Markit Events and Webinars

At the bottom of the menu, there is a search bar with the text 'RESEARCH A GEOGRAPHY' on the left, 'Search...' in the center, and a magnifying glass icon on the right.

Menu options will appear based on the user's access or company subscription.



IRP Matrix

Create a grid of geography pricing relationships. Understand the type of relationship and read related content. Access from menu or green ribbon on Global P&R page.

Toggle between **Map** and **Matrix** views.

Select whether you want to use **Referrer countries/territories** or **Reference countries/territories**

and then **Select geographies** for grid. Grid shows which geographies have formal or informal pricing relationships.

You can change **Orientation** to improve legibility.

Life Sciences: International Reference Pricing

This tool shows where a country/territory refers to other countries'/territories' pharmaceutical pricing.

Map Matrix

Referrer countries/territories Reference countries/territories Select countries/territories

Formal reference Informal reference

Export to Excel Save

Methodology International Reference Pricing Methodology

Headline Analysis Special Reports

Referrer Countries/Territories	Algeria	Argentina	Armenia	Australia	Austria	Azerbaijan	Bahrain	Belarus	Belgium	Brazil	Bulgaria	Cambodia
Albania												
Algeria									✓			
Australia												
Austria									✓		✓	
Azerbaijan					✓				✓		✓	
Bahrain	✓	✓		✓								
Belarus			✓									

Germany

Notes

Under the AMNOG law, the arbitration board shall set the price of innovative medicines based on the EU average level. The price is set based on international reference pricing when the manufacturer fails to negotiate a satisfactory price with the statutory health insurance (GKV). Since March 2012, manufacturers must report net selling prices in the 15 countries.

Country/Territory Profile

Reference Pricing

Related Headline Analysis

German FMOH criticised for 'plundering' GKV reserves to pay for COVID-19 pandemic costs

More Headline Analysis

Click on a hyperlinked geography name to see **Notes** about the IRP regime and direct access to the IRP Country/Territory Report section.

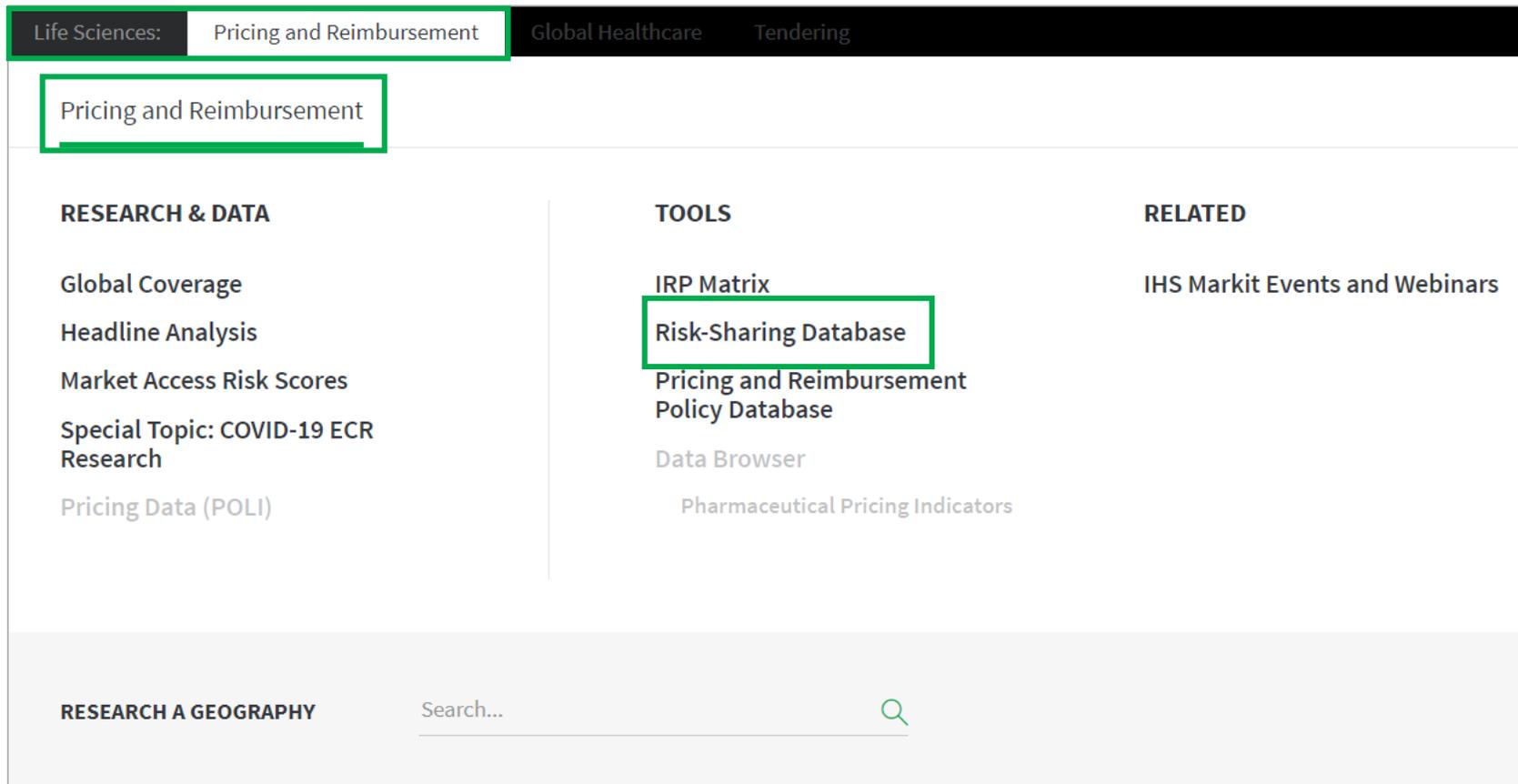
Methodology explains how IRP matrix is sourced and updated.

Export to Excel or **Save** for later use.

Risk-Sharing Database

Risk-Sharing Database Navigation

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement** > **Risk Sharing Database**



The screenshot shows a navigation menu with a black header bar containing the following items: Life Sciences: Pricing and Reimbursement, Global Healthcare, and Tendering. A sub-menu is open under 'Pricing and Reimbursement', which is highlighted with a green box. The sub-menu contains three columns: 'RESEARCH & DATA', 'TOOLS', and 'RELATED'. Under 'RESEARCH & DATA', there are links for Global Coverage, Headline Analysis, Market Access Risk Scores, Special Topic: COVID-19 ECR Research, and Pricing Data (POLI). Under 'TOOLS', there are links for IRP Matrix, Risk-Sharing Database (highlighted with a green box), Pricing and Reimbursement Policy Database, and Data Browser. Under 'RELATED', there is a link for IHS Markit Events and Webinars. At the bottom of the sub-menu, there is a search bar with the text 'RESEARCH A GEOGRAPHY' and a search icon.

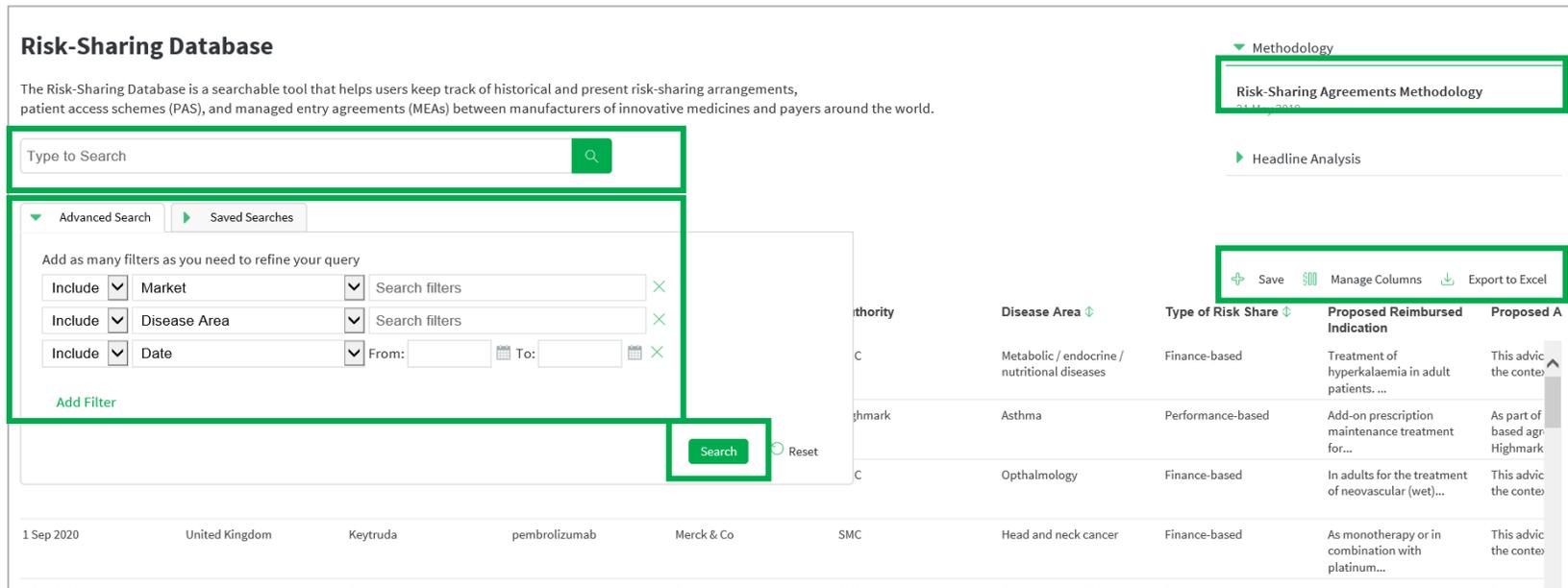
Menu options will appear based on the user's access or company subscription.



Risk-Sharing Database

Browse our full dataset on risk-sharing agreements between healthcare payers and pharma manufacturers. Conduct precise searches using all fields, customize the output grid, save your search, export the data.

Enter free-text search term (includes Boolean logic) in the **Type to Search** box or construct an **Advanced Search** with the available criteria, then click on **Search**.



Risk-Sharing Database
The Risk-Sharing Database is a searchable tool that helps users keep track of historical and present risk-sharing arrangements, patient access schemes (PAS), and managed entry agreements (MEAs) between manufacturers of innovative medicines and payers around the world.

Type to Search

Advanced Search | Saved Searches

Add as many filters as you need to refine your query

- Include Market Search filters
- Include Disease Area Search filters
- Include Date From: To:

Methodology

- Risk-Sharing Agreements Methodology**
- Headline Analysis

Authority	Disease Area	Type of Risk Share	Proposed Reimbursed Indication	Proposed A					
C	Metabolic / endocrine / nutritional diseases	Finance-based	Treatment of hyperkalaemia in adult patients. ...	This advic the conte					
ghmark	Asthma	Performance-based	Add-on prescription maintenance treatment for...	As part of based agr Highmark					
C	Ophthalmology	Finance-based	In adults for the treatment of neovascular (wet)...	This advic the conte					
1 Sep 2020	United Kingdom	Keytruda	pembrolizumab	Merck & Co	SMC	Head and neck cancer	Finance-based	As monotherapy or in combination with platinum...	This advic the conte

Risk Sharing Agreements Methodology explains the methodology behind the database. It also provides a summary of recent trends.

Save your search for future use.

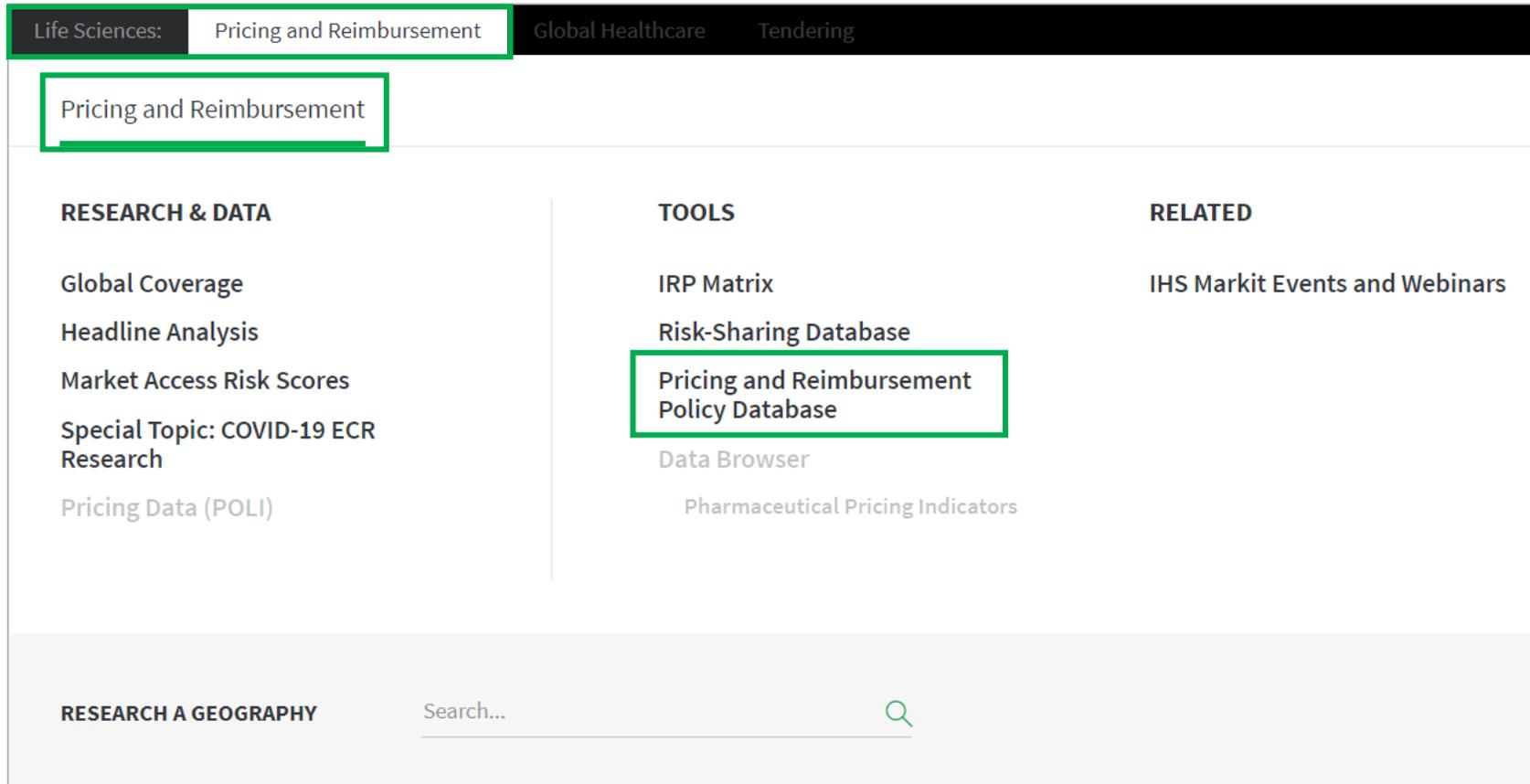
Customize results table with **Manage Columns** and by dragging column widths.

Export the data to Excel.

Pricing and Reimbursement Policy Database

Pricing and Reimbursement Policy Database Navigation

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement** > **Pricing and Reimbursement Policy Database**



Life Sciences: Pricing and Reimbursement Global Healthcare Tendering

Pricing and Reimbursement

RESEARCH & DATA

- Global Coverage
- Headline Analysis
- Market Access Risk Scores
- Special Topic: COVID-19 ECR Research
- Pricing Data (POLI)

TOOLS

- IRP Matrix
- Risk-Sharing Database
- Pricing and Reimbursement Policy Database**
- Data Browser
- Pharmaceutical Pricing Indicators

RELATED

- IHS Markit Events and Webinars

RESEARCH A GEOGRAPHY Search... 

Menu options will appear based on the user's access or company subscription.



Pricing and Reimbursement Policy Database

Cherry-pick geographies and report sections to compare markets and policies. Access from green ribbon on Global P&R page.

Select **Geographies** and **Policies**.

Matrix builds automatically. Ticks show where policies exist for each geography. Click to jump down.

Change orientation allows grouping by geography or policy.

Life Sciences: Pricing and Reimbursement Policy Database

This tool shows where content is available for selected country/territory and policy combinations.

Geography: 45 selected Policy: 21 selected

▶ Saved profiles

Matrix

+ Save profile ↓ Export to Excel ↓ Export to PDF 🖨 Print

Change orientation	Country/Territory Overview: SWOT table	Policy: Overview	Policy: Policy Drivers	Regulatory System: Overview	P&R System: Overview	P&R System: P&R landscape	P&R System: Reimbursement process	P&R System: Price setting	P&R System: Distribution margins	P&R System: Orphan medicines	P&R Policies: Price Cuts / Freezes	P&R Policies: Therapeutic reference pricing	P&R Policies: International reference pricing	P&R Policies: HTA / Pharmacoeconomics	P&R Policies: Generic substitution	P&R Policies: Risk-sharing agreements	P&R Policies: Co-payments	P&R Policies: Product volume caps	P&R Policies: Prescribing guidelines / INN	P&R Policies: Profit / revenue clawbacks	P&R Policies: Physician budget caps
Argentina	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓			✓				✓
Australia	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓			✓
Austria	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓			
Belgium	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓			
Brazil	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓			
Bulgaria	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓			
Canada	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓			
Chile	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓			

Country/Territory Policies

▼ Argentina

▼ Country/Territory Overview: SWOT table

IHS SWOT - Argentina

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Although Brazil has emerged as Latin America's dominant pharmaceutical market over the past decade, Argentina is a significant contributor to regional market value. ▪ Argentina's healthcare system and its infrastructure have focused traditionally on curative care. Efforts now need to be made to shift more resources into the primary care sector. ▪ Pharmaceuticals are freely priced in Argentina, although the government imposes maximum price increases. National OS and prepagas must provide affiliates with access to a range of benefits outlined in the Plan Médico Obligatorio (PMO). 	<ul style="list-style-type: none"> ▪ The healthcare sector is very fragmented, with a large number of both national health funds with varying financial positions. Pricing and reimbursement agreements have to be negotiated separately with many institutional actors. ▪ The ongoing economic recession and currency devaluation, coupled with austerity measures imposed to contain the crisis, are having a detrimental impact on the accessibility of healthcare, and medicine in particular, for Argentinians. The Argentine Pharmaceutical Confederation reported a 5.1% decline in sales volume in 2018. ▪ Argentina has so far failed to achieve satisfactory level of health outcome when compared with other countries with similar level of health spending per capita. ▪ A significant share of the population still lacks appropriate healthcare coverage, and the implementation of an ambitious universal health coverage system is on the agenda.

↻ Reorder by policy ↓ Export to PDF 🖨 Print

Save profile for later use, Export to PDF/Excel, or Print.

Selected content shown automatically here. Click to expand entries.

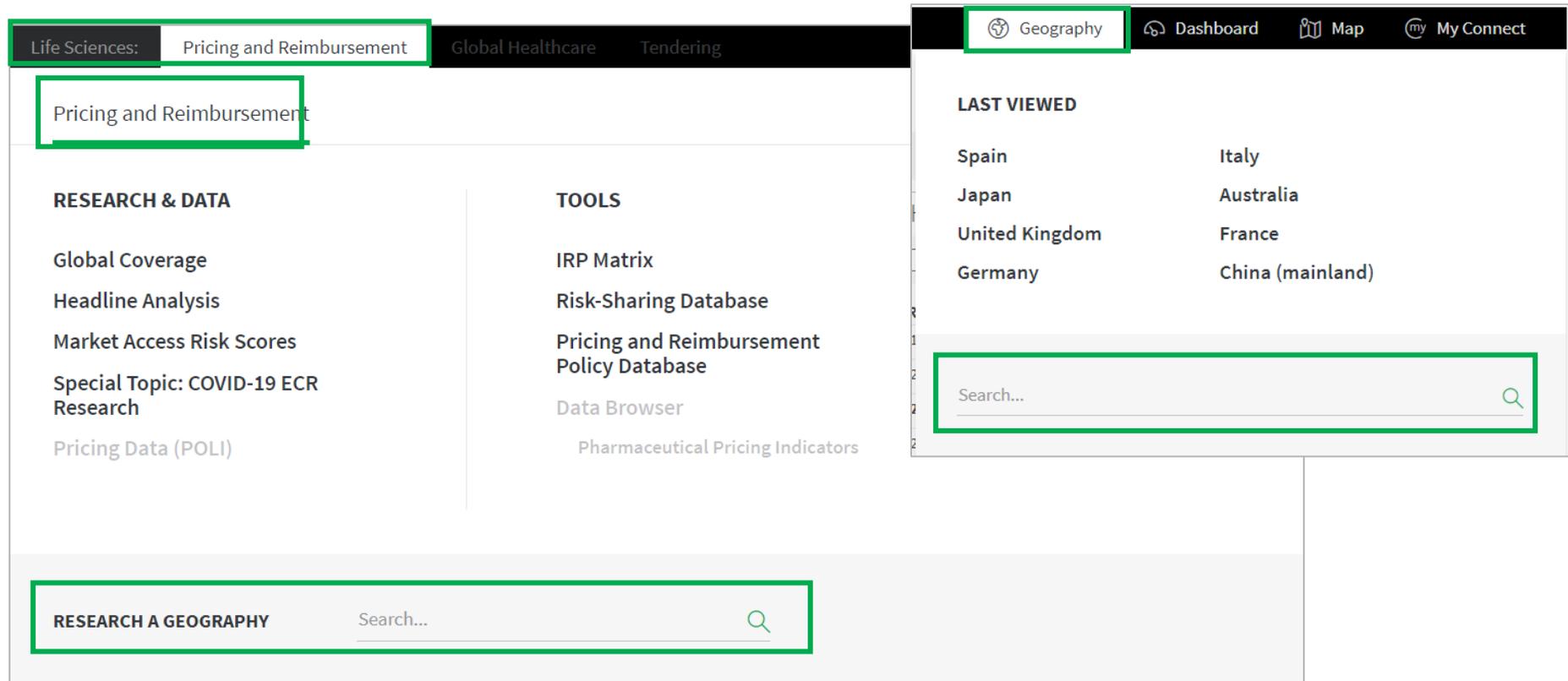
Group the report by geography or section by clicking on **Reorder by policy or geography**.

Print and Export to PDF.

Geography

Geography

In Connect, hover over **Life Sciences** in the black menu bar > **Pricing and Reimbursement** > **RESEARCH A GEOGRAPHY**
 Or hover over **Geography** in the black menu bar > **Search**



The screenshot displays the IHS Markit Connect interface with two navigation paths highlighted by green boxes:

- Path 1:** In the top black menu bar, hover over **Life Sciences:** > **Pricing and Reimbursement**. A dropdown menu appears with **Pricing and Reimbursement** highlighted. Under this menu, the **RESEARCH & DATA** section contains **RESEARCH A GEOGRAPHY**, which is highlighted with a green box and includes a search input field.
- Path 2:** In the top black menu bar, hover over **Geography**. A dropdown menu appears with **Geography** highlighted. Under this menu, the **LAST VIEWED** section lists countries: Spain, Italy, Japan, Australia, United Kingdom, France, and Germany, China (mainland). Below this list is a search input field with the placeholder text "Search..." and a magnifying glass icon, also highlighted with a green box.

Menu options will appear based on the user's access or company subscription.



Geography -1

Drill down to geography-specific content, understand policy, pricing and market trends.

Germany Choose Geography

Life Sciences

Germany's AMNOG system assessed favourably after 10 years, growing costs focused on orphan drugs
18 Sep 2020

Headline Analysis

- German FMOH criticised for 'plundering' GKV reserves to pay for COVID-19 pandemic costs 24 Sep 2020
- German GKV fund conference highlights 'unfair' drug prices, calls for changes to evaluation process 24 Sep 2020
- G-BA reaches same conclusions in second assessment of Kymriah 22 Sep 2020
- Germany's AMNOG system assessed favourably after 10 years, growing costs focused on orphan drugs 18 Sep 2020 **FEATURED**
- Germany's largest GKV fund group moves to multi-supplier model, includes ethical considerations in latest antibiotics tender 15 Sep 2020

More Headline Analysis on Germany

Market Access Risk Score

Rating: Overall

Overall: 2.50 (HIGH)

Quantitative Measures: 3.29

Qualitative Measures: 2.22

Other Risk Scores: 1.57

Event Driven Measures: 3.04

More Risk Ratings

Go to Pricing and Reimbursement - Global

Go to Policy

Service Bulletin

Market Access MARS 2020 27 Aug 2020

IHS Markit lowers 2020 MARS update 31 Jul 2020

Market Access MARS 2020 29 Jul 2020

More Service Bulletin

Methodology

IHS Markit Events

Country/Territory Report

- Hide Table of Contents
- Full Report
- Life Sciences
 - Country/Territory Summary
 - Country/Territory Overview
 - Expenditure
 - Policy
 - Regulatory System
 - P&R System
 - P&R Policies

Forecast (healthcare): Total health spending in Germany is forecast to grow 2.2% in 2020 and 4.2% in 2021 to EUR434.228 billion in 2021. The per-capita health spend is expected to reach EUR4,972 in 2020 and rise to EUR5,176 in 2021.

Forecast (pharma): Total pharmaceutical sales in Germany are forecast to grow 1.0% in 2020 and 6.0% in 2021 to EUR67.942 billion in 2021. After a slowdown in growth following the implementation of the Pharmaceutical Market Restructuring Act (AMNOG) law in 2011, Germany's market has returned to mid-single-digit growth.

Risk: Germany has a high market access risk score of 2.531. Recent negative pressure on risk has come from the decision as part of the Act on the Greater Security of Pharmaceutical Care (GSAV), implemented into law in August 2019, to allow substitution with biosimilars at the pharmacy level - albeit with a three-year delay (due to come into force in 2022), and with the proviso that the Federal Joint Committee will consider the interchangeability of each biosimilar and originator biologic and regulate accordingly. The GSAV also introduced a new mechanism for data collection as part of benefit assessments for orphan medicines, and drugs with conditional authorisations, or authorisations issued on an exceptional basis, which will increase the administrative and financial burden on producers, as well as making the regulatory environment more restrictive for these products. Nevertheless, the year of free pricing allowed for in the AMNOG system, prior to the application of the discounted price, continues to allow producers to recoup some development costs.

Conclusion: Germany remains a highly attractive market, with a strong healthcare infrastructure and a large population with a high disposable income, and typically features near the beginning of the global launch sequence cycle. However, during recent years, there has been considerable pressure on price and access conditions that has in some cases led to product withdrawals following the early-benefit assessments.

Sources: IHS Markit Healthcare Forecasts and MARS Q3 updates, July 2020

Headline Analysis: latest market and policy developments.

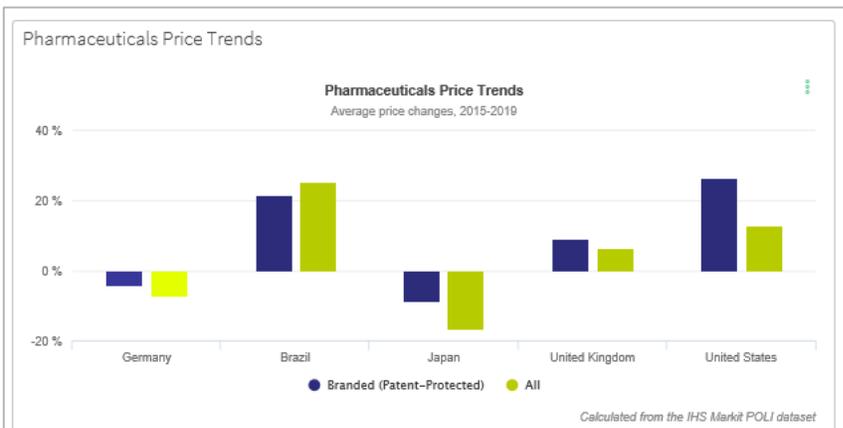
Zoomed Market Access Risk Score heat map.

Special Reports for in-depth coverage of key themes.

Market Access Risk Ratings with methodology via icon.

Access in-depth **Country/Territory Report.** Jump straight to chapters using Table of Contents link.

Geography - 2



Charts highlight **Price Trends** and **Pricing Indicators** for the geography in question. Charts can be exported and edited using the  icon. Separate subscription is required to see the full list of POLI indicators.



Risk-Sharing Agreements of the geography in question are shown with the link to the full database.

Date	Drug	Company	Type of Risk Share
1 Apr 2020	Zolgensma	Novartis	Performance-based
1 Jan 2020	Zynteglo	Bluebird Bio	Performance-based
1 Nov 2019	Ajovy	Teva Pharmaceutical	Performance-based
1 Nov 2019	Ajovy	Teva Pharmaceutical	Performance-based
1 Jun 2019	Yescarta	Gilead Sciences	Performance-based

[More Risk Sharing Data](#)

My Connect

Email alert options, access to saved content and Report Builder

My Connect – Email Notifications

Click on **My Connect** to manage **Email Notifications** by selecting/deselecting the check boxes in the **Immediate**, **Daily** or **Weekly** columns

The screenshot shows the 'My Connect' interface with the 'Standard Email Notifications' section selected. A 'Notification Settings' modal is open, allowing users to configure their email alerts. The modal includes options for delivery time, content inclusion, and notification grouping. Below the modal, a table lists active notifications with checkboxes for 'Daily' and 'Weekly' delivery frequencies.

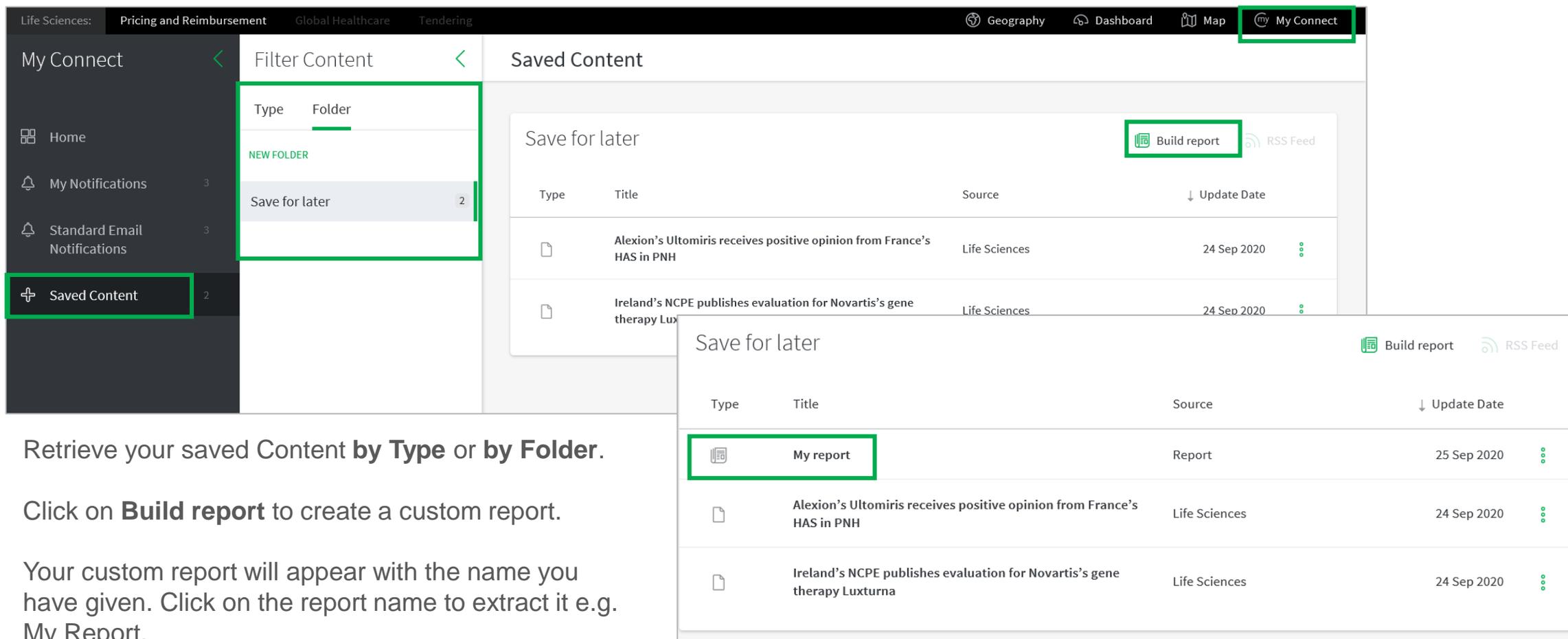
Type	Notification name	Life Sciences	Daily	Weekly
	World Markets Pricing and Reimbursement: Headline Analysis	Life Sciences	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	World Markets Pricing and Reimbursement: Service Bulletins and Events	Life Sciences	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	World Markets Pricing and Reimbursement: Special Reports	Life Sciences	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click into **Settings** to set the timing of your alerts and click **Apply**.



My Connect - Report Builder

On **My Connect**, access your saved content under **Content by Folder** and select **Build Report**



The screenshot shows the 'My Connect' interface. The top navigation bar includes 'Life Sciences', 'Pricing and Reimbursement', 'Global Healthcare', 'Tendering', 'Geography', 'Dashboard', 'Map', and 'My Connect'. The left sidebar has 'My Connect', 'Home', 'My Notifications', 'Standard Email Notifications', and 'Saved Content'. The main content area is titled 'Filter Content' and 'Saved Content'. The 'Filter Content' section has 'Type' and 'Folder' tabs, with 'Folder' selected. Below the tabs is a 'NEW FOLDER' button and a 'Save for later' button with a '2' next to it. The 'Saved Content' section shows a list of articles with columns for 'Type', 'Title', 'Source', and 'Update Date'. A 'Build report' button is visible in the top right of the list. A modal window is open, showing a 'Save for later' section with a 'Build report' button and an RSS Feed icon. The modal window shows a list of articles with columns for 'Type', 'Title', 'Source', and 'Update Date'. The 'My report' entry is highlighted with a green box.

Retrieve your saved Content **by Type** or **by Folder**.

Click on **Build report** to create a custom report.

Your custom report will appear with the name you have given. Click on the report name to extract it e.g. My Report.



My Connect - Report Builder

On **Report Builder**, edit the report content and Export it to **PDF**, **Word** or **Save**

Review the **Title**, add **Subtitle** and **Introduction**.

Use **Ordered By** to arrange saved content by Country, by Type, and in Custom to drag and drop articles to your preferred order. **Add your section.**

Export your custom report to PDF/Word or **Save** it for later use.

Report Builder

Report Title:

Subtitle:

Introduction:

CONTENT LIST

Ordered By: Country Type Custom Article content: Live Snapshot

Add your section

- ▶ Alexion's Ultomiris receives positive opinion from France's HAS in PNH
France , Headline Analysis
✕
- ▶ Ireland's NCPE publishes evaluation for Novartis's gene therapy Luxturna
Norway , Headline Analysis
✕
- ▶ Bayer garners DCGI approval for Eylea for new diabetic macular oedema indication in India
India , Headline Analysis
✕

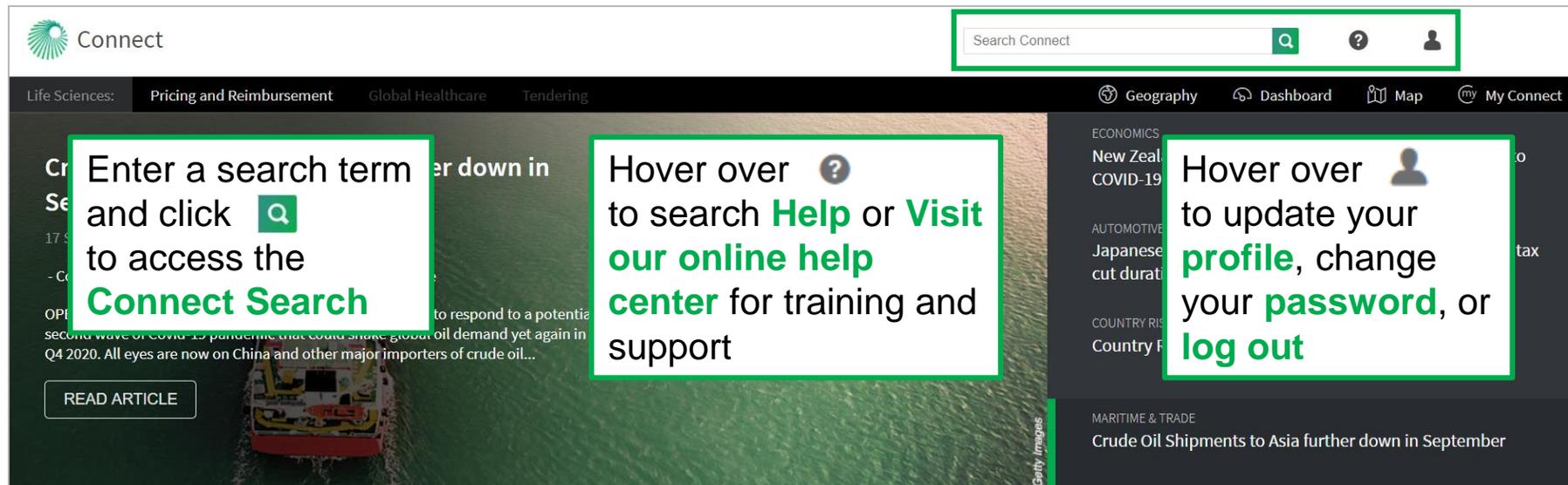
Export to PDF
Export to Word
Save
Cancel



User Options

User Options

Access Search, Help and your User Profile at the top of the page



Contact Us

Contact Us

To schedule a complimentary Connect training, email us on IHSConnectTraining@ihsmarkit.com.

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Mobile App

Access IHS Markit Connect anywhere, anytime for the information, insight and analytics necessary to make critical decisions. Download the free Connect [iPad](#) and [Smartphone](#) apps to your mobile device.

