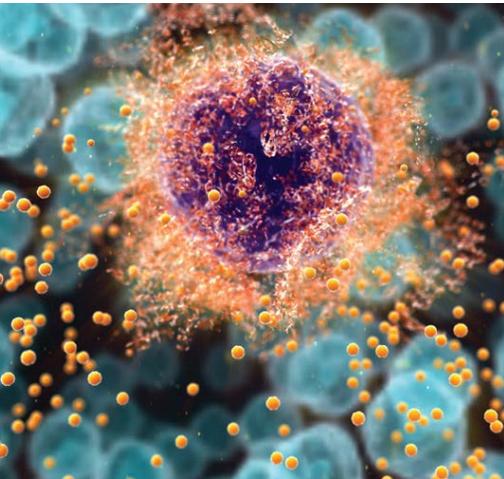


Collaborating to strengthen the way healthcare is financed

Fernando Arnaiz
Global Access - Roche



What I will talk about today:

- 1 Our approach to improve patient access**
- 2 Roche as a partner**



Our strategy

We focus on finding new medicines and diagnostics that help patients live longer, better lives and evolve the practice of medicine

We are guided by our purpose

Doing now what patients need next.

What we do:

Our focus is on fitting treatments to patients: providing the right therapy for the responding group of people at the right time.

How we tackle the challenges

Four key factors need to be in place to successfully improve access to effective, quality healthcare



Awareness
of disease and symptoms is essential for screening and early detection.



Diagnosis
of the disease can be complex, but is vital to ensuring the right treatment choice.



Healthcare capacity
needs well-trained teams working together with the right equipment to provide the best chances for patients.



Funding
for healthcare investment and reimbursement of medicines and tests is critical to protect patients from financial burden.

We are committed to strengthening health systems to improve access to innovation

What we are doing

To protect patients from the financial hardship caused by cancer, Roche explores **new funding models** that increase access to **adequate cancer diagnostics and treatment**

How we do it

Roche actively works with governments, private players & other relevant stakeholders **to design and implement affordable funding solutions for innovative treatments** that allow them to reach more patients

We work in partnerships to develop tailored solutions that reach more patients

From one local initiative to one global strategy

Then 2009 - 2017

Focus on Private funding solutions:

- Ad hoc solution for china
- Affordable and yet comprehensive cancer insurance policies in a range of countries

Now 2018 +

Focus on Healthcare funding solutions

- Broad approach to innovative & sustainable funding solutions including new funding mechanisms: Impact bonds, Health saving accounts
- Public-Private partnerships for Universal Health Coverage



Swiss Re



Moving NCD Care Forward



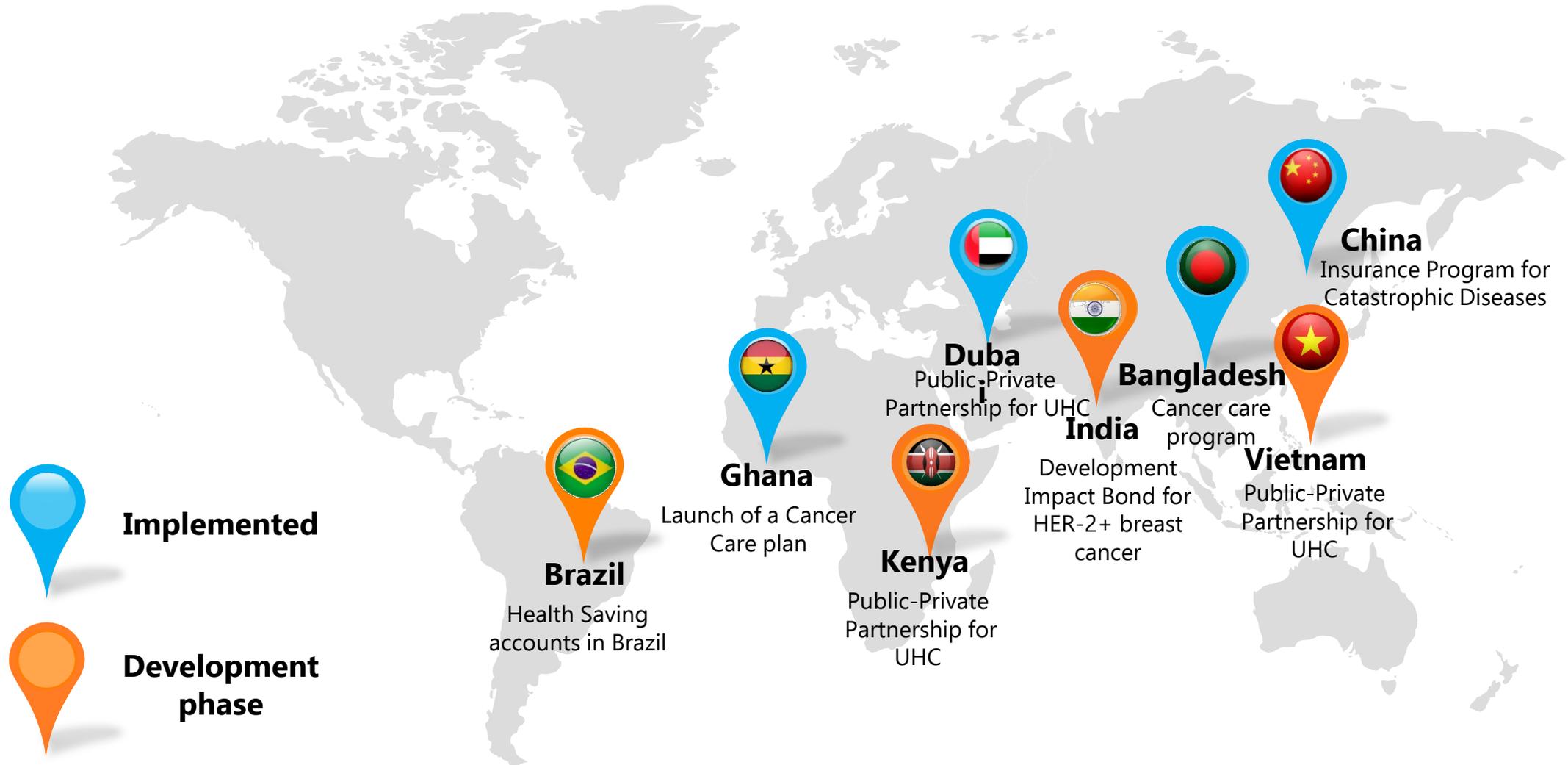
THE WORLD BANK



World Health Organization

C/Can 2025: City Cancer Challenge

Some examples of Roche collaboration with public and private sector to develop new funding solutions



How Roche is collaborating with public and private sector to develop new funding solutions



Where it all started: China



- + 20 cancer insurance policies launched with multiple insurance companies
- Public-Private partnerships in several provinces

每份“质量优享”可享受以下保障利益	
恶性肿瘤确诊保险金 [确诊初次发生恶性肿瘤] 100,000元	特定医疗保险金 [在保险期间内，因质子重离子放疗技术产生的医疗费用] 累积赔付上限 300,000元
恶性肿瘤医疗保险金 [发生的与恶性肿瘤治疗相关的合理且必要医疗费用，突破社保限制，按照100%比例赔付] 累积赔付上限 100,000元	疾病身故保险金 [合同有效期内，被保险人因病身故且未发生恶性肿瘤] 无息退还 已交纳的当年度保险费



Worked with Public + Private to design comprehensive, yet affordable cancer coverage

Sharing expertise on HC systems and unmet medical needs to enable private (funding) partners developing new solutions.



Roche supported insurers to develop additional policies to cover cancer treatment and care

Epidemiology, joint awareness and communication campaigns
patient flows and treatment cost data

How Roche is collaborating with public and private sector to develop new funding solutions



Comprehensive compulsory cancer funding scheme in Dubai



Launch event in Dubai, Jan 2018

- **Public-private partnership between the Dubai Health Authority, AXA and Roche UAE focusing on low income workers in Dubai.**
- **Solution combining a compulsory cancer screening and treatment funding scheme for expats and national screening guidelines**
- **Provides comprehensive access to 4.6 Mio people**



DHA recommended Roche to collaborate with Axa to develop a funding solution

A **central fund** will be created to cover the extra cost of treatment once the annual limit of the basic plan is reached.



Roche supported the development of national screening guidelines

Roche will run a **comprehensive cancer screening education program** in cooperation with the DHA

How Roche is collaborating with public and private sector to develop new funding solutions



Cancer Care plan in Ghana

First comprehensive private insurance policy targeting both formal and informal sectors including an affordable top-up cancer cover launched in Ghana



Roche also run cancer awareness campaigns and trained doctors and nurses to increase availability of comprehensive cancer screening and treatment



Roche supported the development of additional policies to cover cancer treatment and care

Roche supported the insurance cover design by sharing insights and data on local treatment pathways and providers, incidence and cost data



Access to healthcare is a priority for Roche



We recognise
that access is a
*multidimensional
challenge.*



We have a
*systematic &
comprehensive
approach*
to access based on a
deep understanding of
individual country needs.



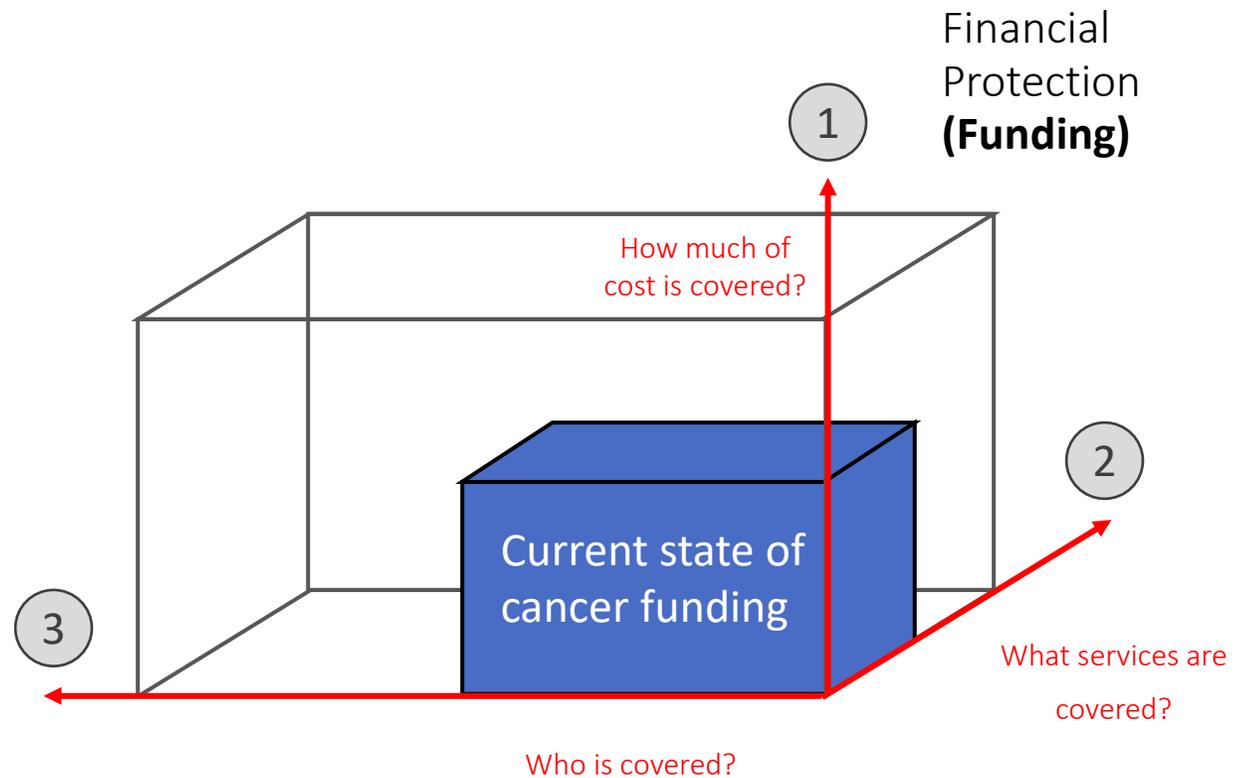
We work in
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to develop
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*Doing now what patients
need next*

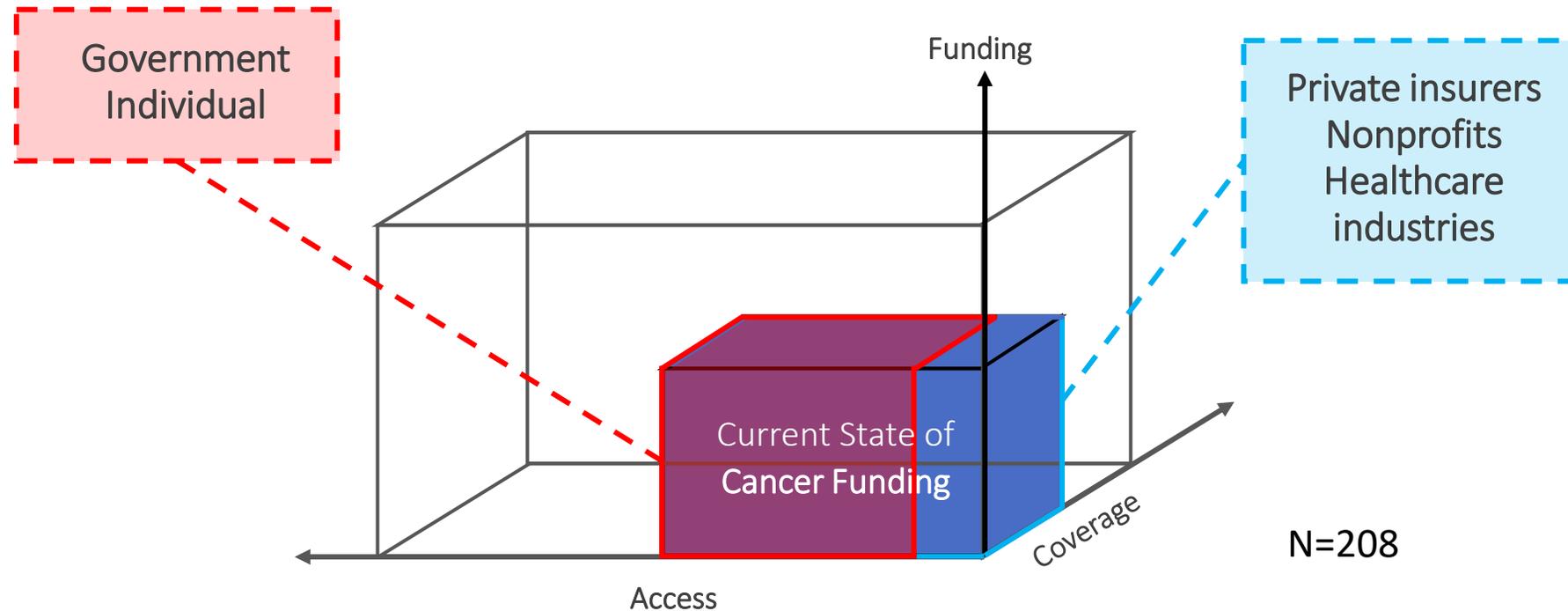
Insights on Financing Cancer Care and Treatment in Asia Pacific

All people no matter where they live, no matter what their age, have the right to access high quality and affordable healthcare and to lead healthy and productive lives.

What are the funding models for cancer treatment in Asia?

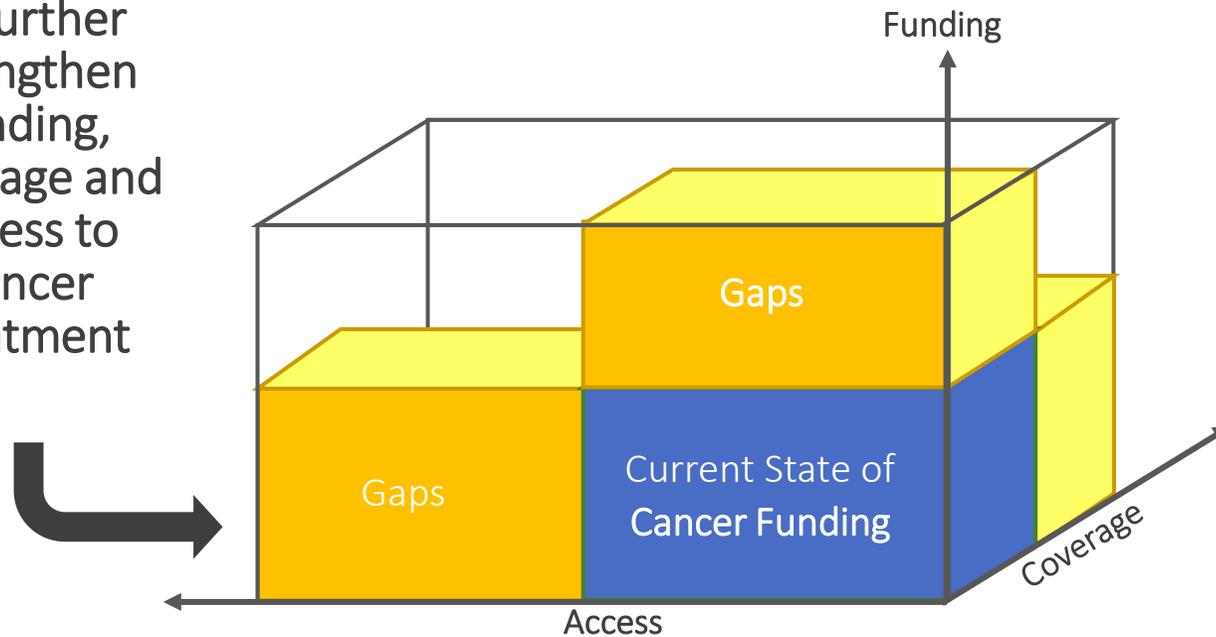


Traditional patterns of funding are consistent across countries

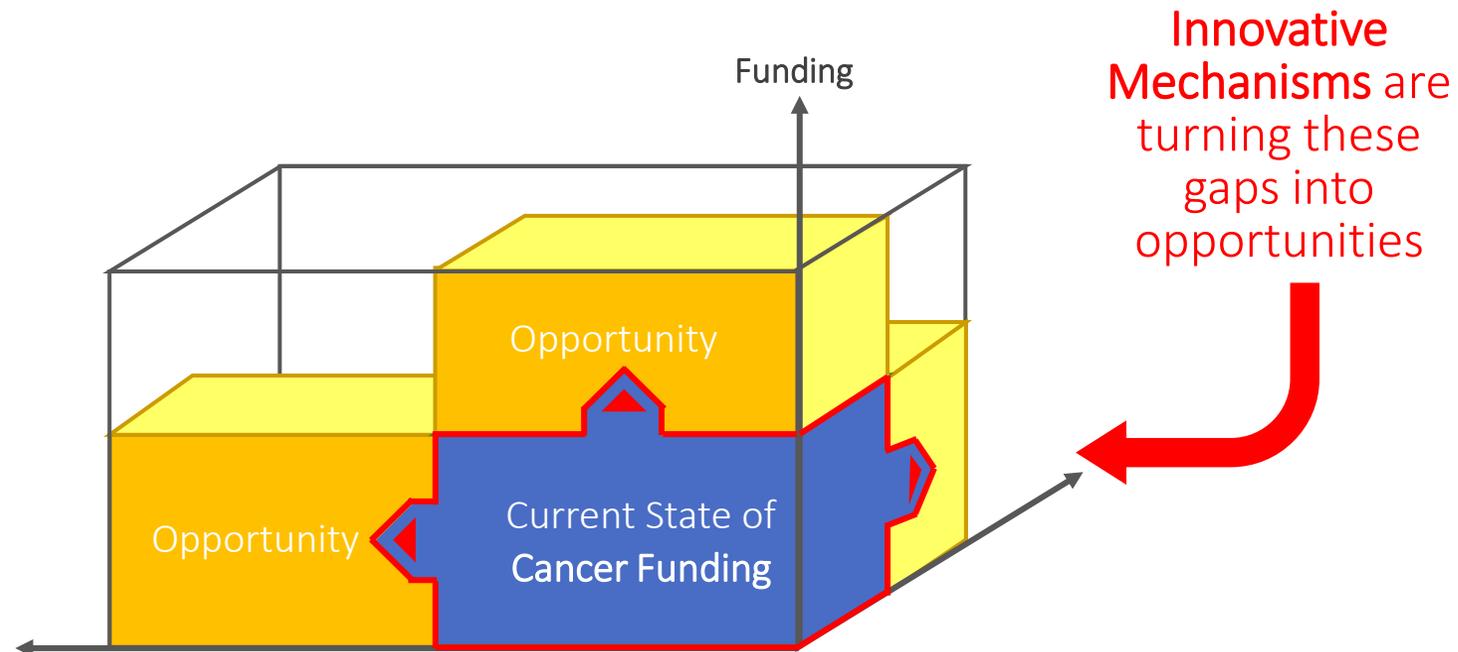


Traditional models of funding leave gaps in all three dimensions

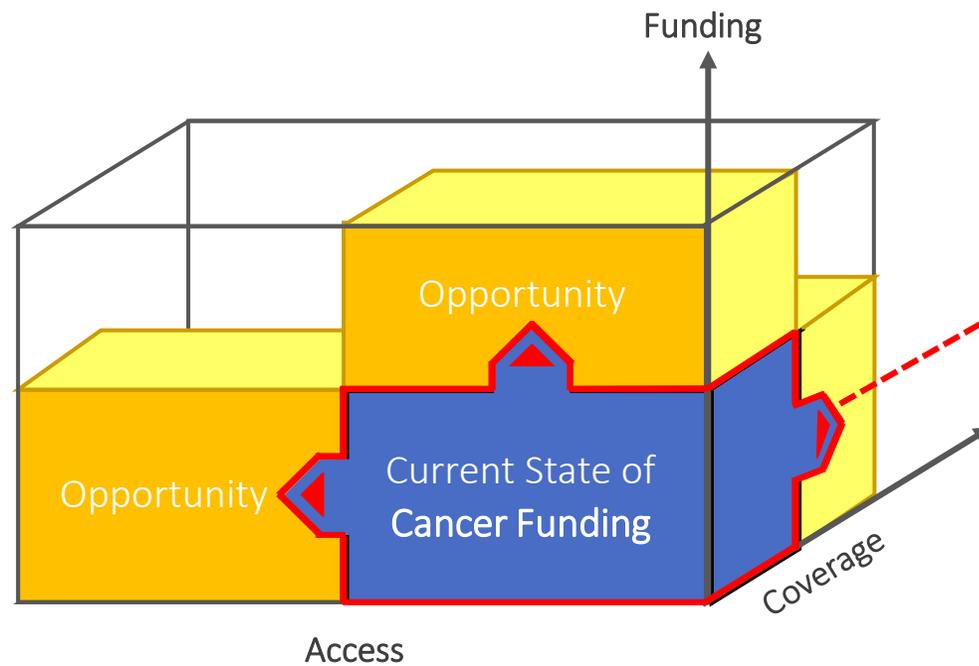
This leaves gaps to further strengthen funding, coverage and access to cancer treatment



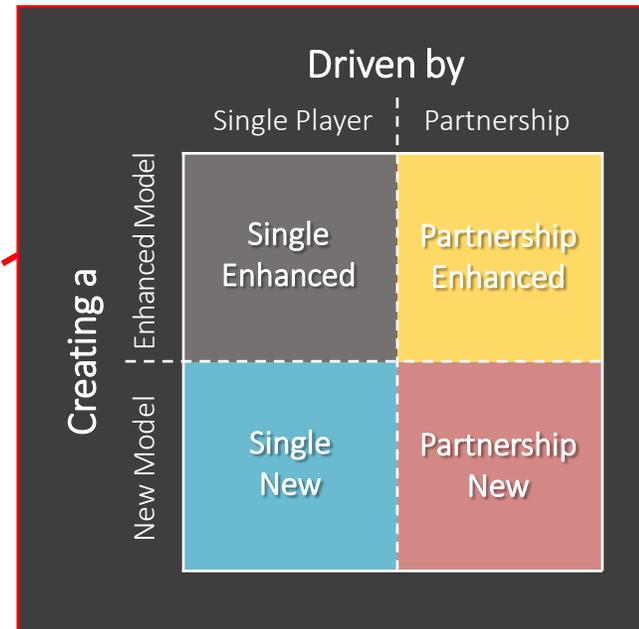
Innovative mechanisms are helping to reduce these gaps



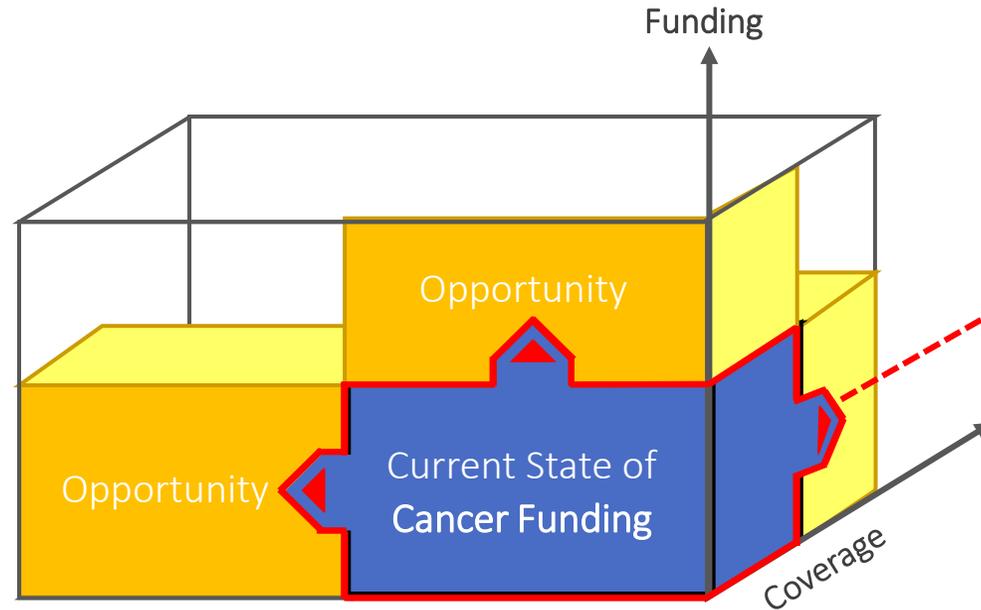
One-fifth of mechanisms (n=40) are reducing a gap in an innovative way



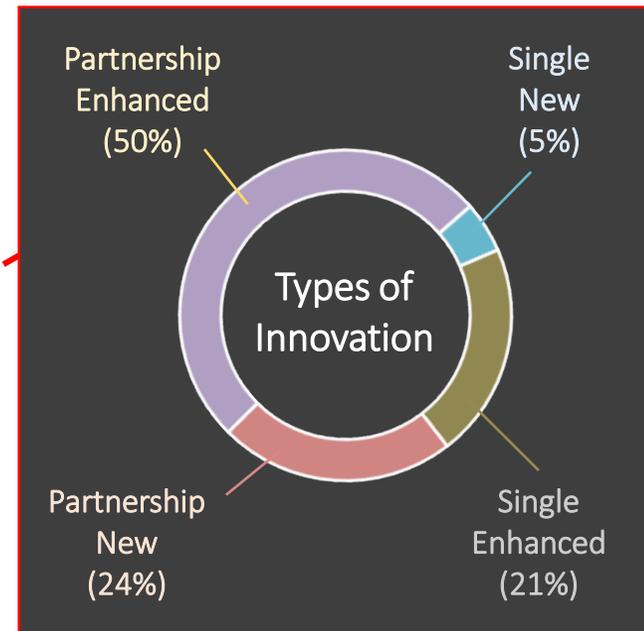
Innovative Mechanisms



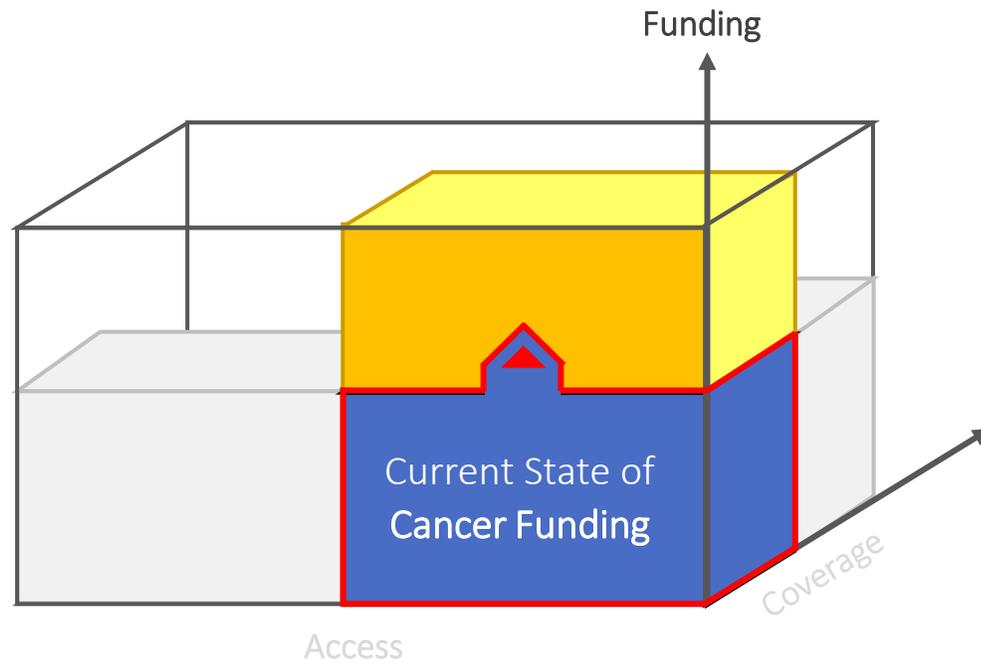
Innovations are driven by partnerships and enhancements to existing mechanisms



Innovative Mechanisms

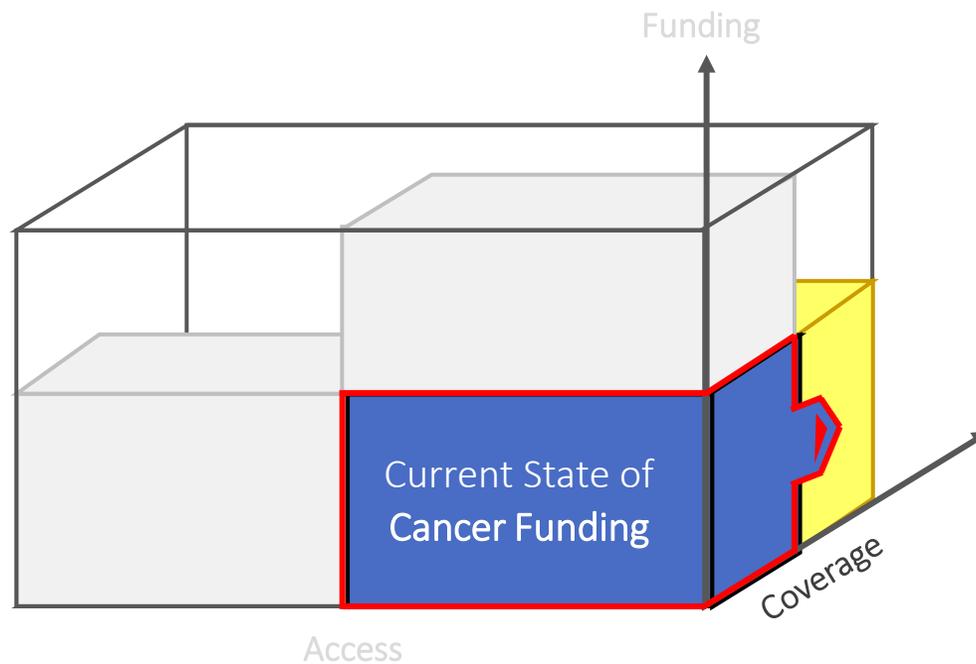


Innovations drive solutions that improve funding for cancer treatment



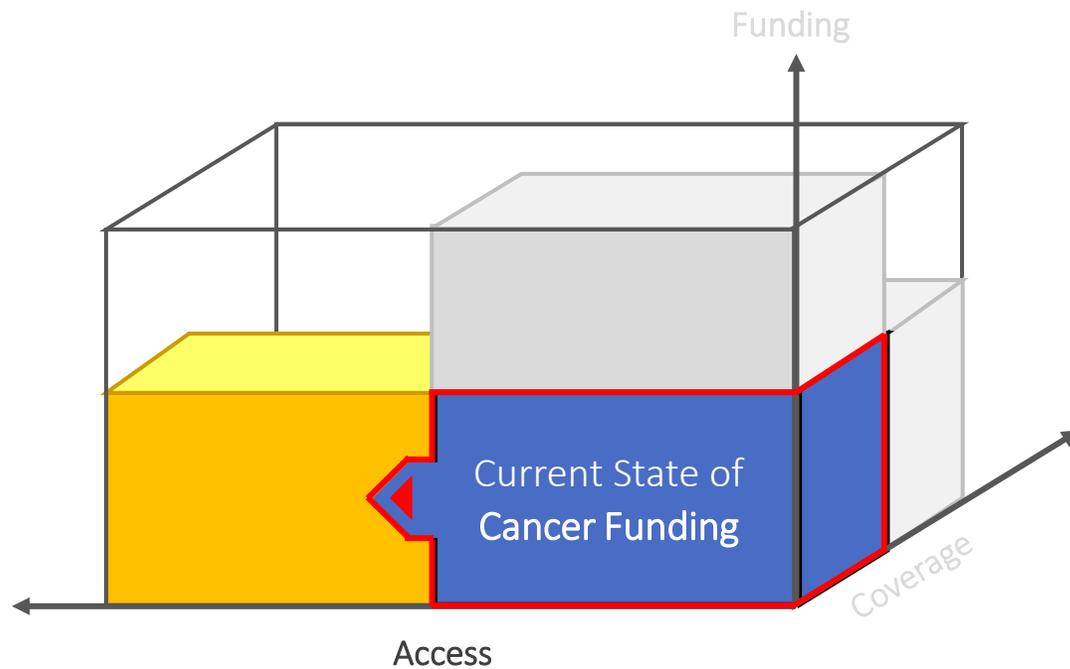
 Funding	New sources of revenue
	Out of pocket support
	PPP for UHC
 Coverage	Coverage of new tech
	Holistic care
	Screening as entry to care
 Access	Risk sharing partnerships
	Financing for underserved

Innovations drive solutions that improve coverage for cancer treatment



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Innovations drive solutions that improve access for cancer treatment



 Funding	New sources of revenue
	Out of pocket support
	PPP for UHC
 Coverage	Coverage of new tech
	Holistic care
	Screening as entry to care
 Access	Risk sharing partnerships
	Financing for underserved

For more information...

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<https://healthfutures.sg/insights/>



The Indian Breast Cancer Development Impact Bond

October 2018

An Impact bond is an innovative financial instrument designed to ensure that donors pay for only outcomes

Traditional grant making structures

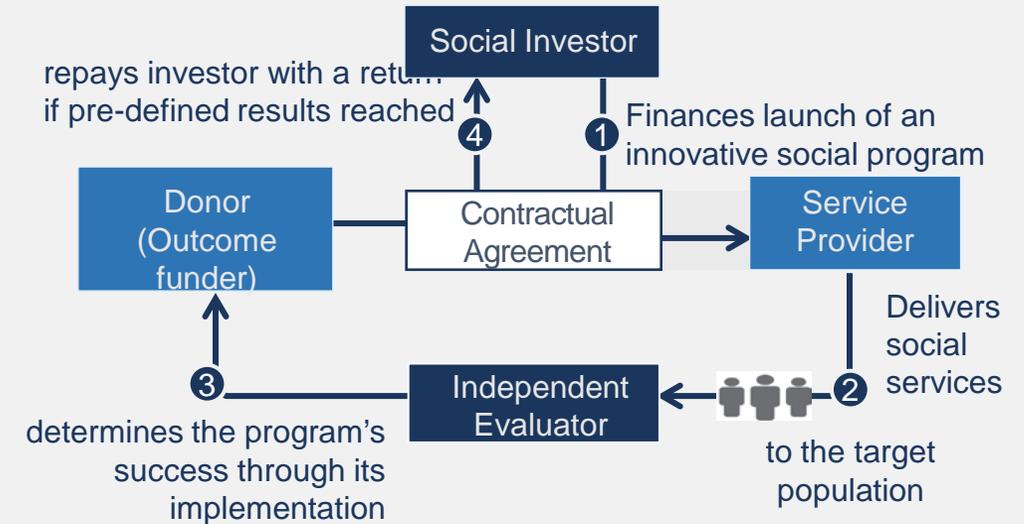


✗ Not linked to performance/outcomes

✗ Additional capital is not brought in

✗ Risk is borne entirely by the donor

Impact Bonds



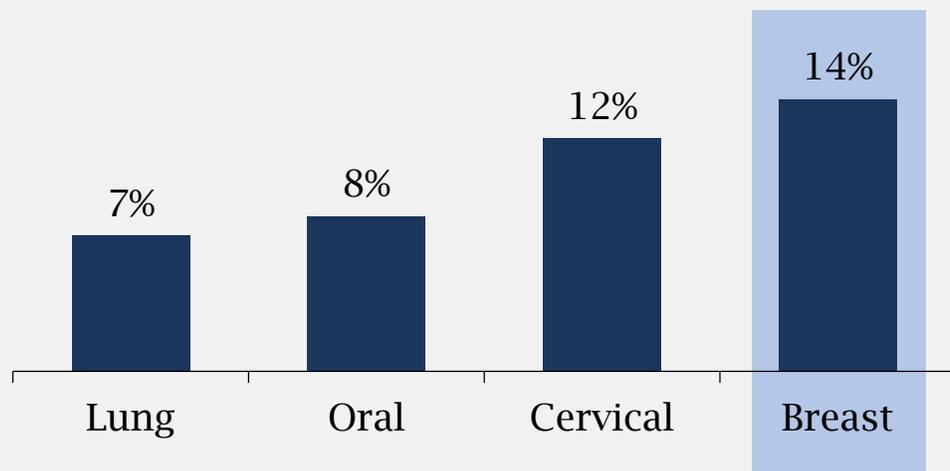
✓ Linked to performance/outcomes

✓ Additional capital is brought in

✓ Risk is borne by multiple entities along with the donor

Why does breast cancer in India need an impact bond?

Breast cancer is the most frequent type of cancer in India



- Mortality rate from breast cancer in India is high with **150,000 cases per year and over 50,000 deaths**
- ~78% of the affected women are in the working age group (<60 years), resulting in an estimated **USD 400 million+ economic loss** annually

An impact bond can significantly shape the delivery of breast cancer care in India



Demonstrating cost-effective continuum of care from detection to post-treatment



Upfront commitment by social investors to catalyze investment in long-term capacity building and process improvements



Increased focus on quality of care can be reached by incentivizing service providers that achieve the target health outcomes

We worked with 22 major cancer hospitals to identify key challenges and thereby interventions for breast cancer care in India

Key areas of concern identified

A

Late detection of breast cancer in patients

B

Deficiency in processes implemented at hospitals

C

Inadequacy of quality medical infrastructure

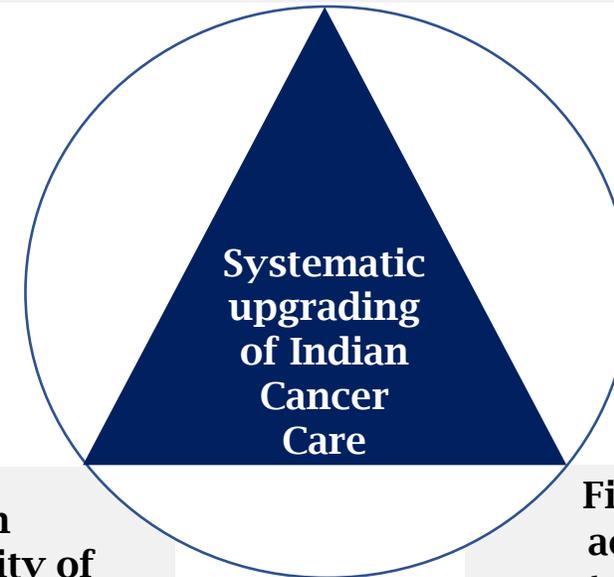
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Inability of the patient to afford quality healthcare

Targeted interventions through impact bond

1

Shifting the curve to the left through early detection



2

High quality of patient care

Financial access to targeted therapy

3

The bond hopes to improve awareness and early detection, adherence to treatment, and access to therapy for breast cancer patients

Touching the lives of millions of Indian women



5 mn+
women expected to be reached through awareness program



2 mn+
women to be screened for breast cancer



67k+
patients to be tracked for adherence to the treatment

Seeking to deliver tangible outcomes to cancer care in India



15k+
new early-stage breast cancer (EBC) cases detected



10k+
HER-2¹ positive patients to receive access to biologics



20 - 40%
potential increase in survival rates

1. HER2 - Human epidermal growth factor receptor (HER/EGFR/ERBB) family. Typically about 1 out of 5 women with breast cancer exhibit a more aggressive strain of breast cancer, known as the HER-2 for which treatment with biologics has been clinically proven to achieve higher survival rates