



pan-Canadian
Pharmaceutical
Alliance

Progress in motion

2023–24 impact report



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About the pCPA

The pan-Canadian Pharmaceutical Alliance (pCPA) is an independent organization whose primary responsibility is to lead and support negotiations with drug manufacturers on behalf of provincial, territorial and federal drug plans. Our organization is governed by a rare collective of all public drug plans across the country who come together to act as our board of directors.

With the combined negotiating power of these jurisdictions, we work to achieve greater value for brand name and generic drugs. The important work we are leading has never been done on this scale in Canada.

Land acknowledgement

The pCPA recognizes the inherent and treaty rights — as well as the history, strengths and diversity — of First Nations, Inuit and Métis Peoples, and we acknowledge the ancestral and unceded territories of Canada's Indigenous Peoples. Our team is located across the country on several traditional territories, and we are grateful to stand, live and work on these lands.

We also acknowledge and recognize the many challenges and harms, past and present, experienced by First Nations, Inuit and Métis communities when accessing, or trying to access, Canada's healthcare system. The pCPA works toward improving health outcomes for all Canadians.



Message from leadership

As the old saying goes, “Life is a journey.”

A journey isn’t simply about reaching a destination. Typically, a traveller will encounter a series of experiences, opportunities, challenges and discoveries along the way. They meet new people and learn new things that ultimately shape who they are and who they become.

As we reflect on this past year, we’re confident the pCPA is well along its journey.

On behalf of the Board of Directors, we’re pleased to present this year’s impact report. Its theme — progress in motion — has been chosen carefully. Our pCPA journey mirrors the ongoing momentum within Canada’s pharmaceutical ecosystem, a rapidly evolving environment that requires all of us to remain nimble and responsive.

In 2023 the pCPA completed its transition to an independent organization, allowing us to respond to change more swiftly and efficiently. In keeping with our strategic goals and our long record of achievements, we’ve embraced opportunities to collaborate with other organizations, developed innovative solutions to emerging challenges, and created an environment where staff can thrive.

Through it all, we’re keeping a critical focus on what we do best. The pCPA is becoming better positioned to lead more negotiation processes with manufacturers

on behalf of public drug plans and help achieve lower drug costs. In 2023–24, pCPA negotiations saved Canadian public payers an estimated \$4.6 billion. True to our vision, we’re continuing to help ensure our publicly funded health system remains sustainable, to the benefit of Canadians from coast to coast.

The pCPA is a true success story and we owe it all to our incredible team — from our board members to the drug plans, to our brilliant and passionate staff. Thanks to their foresight, we are on solid ground and ready to take our next steps. We would be remiss if we didn’t also acknowledge the leadership of outgoing board chair Mitch Moneo, who skillfully guided the organization at this pivotal juncture. The importance of these many contributions cannot be overstated, and we are deeply grateful.

The revitalization groundwork laid in 2022 has given the pCPA a safe and solid starting place from which to move forward, build and grow. We’re ready to continue to forge our way on the road ahead — to build from strength to strength, navigate with confidence through a changing environment, and learn along the way.

We look forward to continuing this journey together.



Robert Shaffer
Board Chair

A handwritten signature in blue ink, appearing to read 'R. Shaffer'.



Dominic Tan
Acting CEO

A handwritten signature in blue ink, appearing to read 'Dominic Tan'.

Year in review

This past year has been one of growth and change for the pCPA.



We completed our transition to an independent organization and held our first annual general meeting in October 2023.



We introduced new analytic tools, developed new initiatives to support faster public coverage for promising therapies, and tightened up assessment timelines for generic drugs.



We explored and developed new opportunities to collaborate and strengthen our presence in the pharmaceutical ecosystem.



We continued to grow our small but mighty team to a total of 27 employees as of March 2024.

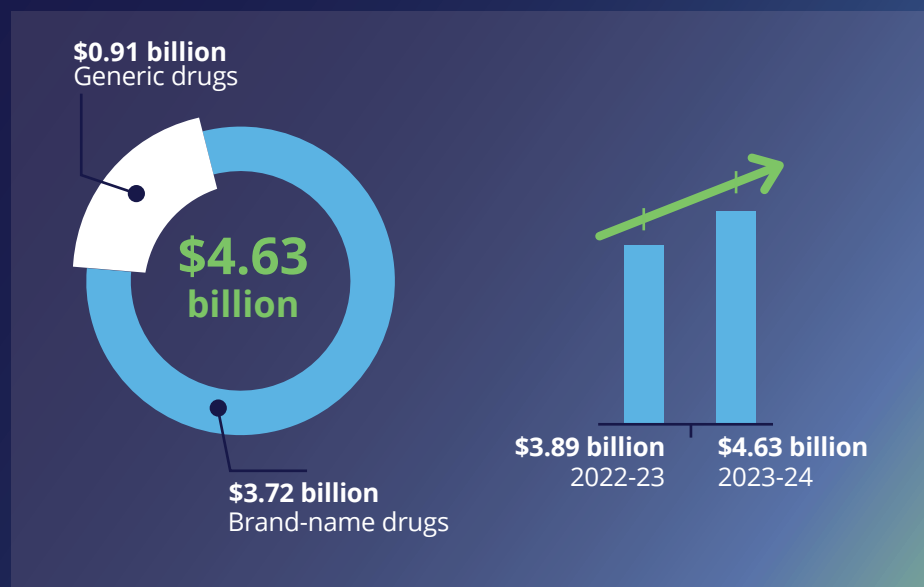
Buoyed and inspired by these accomplishments, the pCPA has been moving from a time of transition to one of forward motion.

Showing impact: By the numbers

Savings

The work that we lead, in partnership with our members, is critical to ensuring public drug plans remain sustainable. The savings achieved by the pCPA are reinvested back into government systems and programs — the more savings, the more money available to support Canadians.

Estimated savings in 2023–24



Estimated cumulative savings to date: \$24 billion

Negotiations

Overall, the pCPA's productivity related to negotiations continues to increase compared to pre-pandemic levels. Negotiations are up by more than 50% and we have seen a systematic increase in access to relevant and cost-effective treatments.



44
negotiations



36
signed letters of intent



5
negotiations closed
without agreement



41
total negotiations

Responding to our evolving landscape

The pharmaceutical landscape is changing rapidly. At no time in history have we been faced with so many advances and challenges in all facets of our health systems. In transitioning to a stand-alone organization, the pCPA is better positioned to swiftly respond to this ever-changing environment. And we rose to the occasion in 2023–24.

pTAP

The drug reimbursement process in Canada is complex and requires many steps. Assessing new drugs for safety and clinical effectiveness, together with negotiating prices with pharmaceutical manufacturers, can result in a long wait for some patients.

Recognizing the need to adapt to the emergence of new drugs and therapies for which there is less evidence currently available, we rolled up our sleeves and developed the [pCPA Temporary Access Process \(pTAP\)](#), to launch in early 2024–25. A pilot project, the pTAP negotiation pathway applies to drugs that follow the time-limited reimbursement pathway from Canada's Drug Agency. These are typically new, innovative therapies that show early promise and have been given conditional regulatory approval while ongoing longer-term, confirmatory trials are in progress. Through pTAP, we will be able to negotiate these drugs sooner than usual, allowing public drug plans to offer temporary coverage earlier.

We want to thank Canada's Drug Agency, the Institut national d'excellence en santé et en services sociaux (INESSS), clinicians, patient groups and industry associations who provided input during the development phase. This collaborative process was critical in ensuring that pTAP would allow for early negotiations while still maintaining safeguards to protect patients against the risk of providing coverage for drugs with much less clinical evidence.



Three-year pricing initiative for generic drugs

This year, we renewed our [pricing initiative for generic drugs](#), which will be in effect until 2026.

The initiative builds on our ongoing collaboration with the Canadian Generic Pharmaceutical Association (CGPA). This new joint agreement adds to those developed over the last 10 years in partnership with the CGPA, such as the pan-Canadian tiered pricing framework and pan-Canadian select molecules.

With this agreement, “the price of new single-source generics entering the pan-Canadian tiered pricing framework automatically drop to 55% of brand reference price after three (3) months from the start of public funding in a participating jurisdiction.”

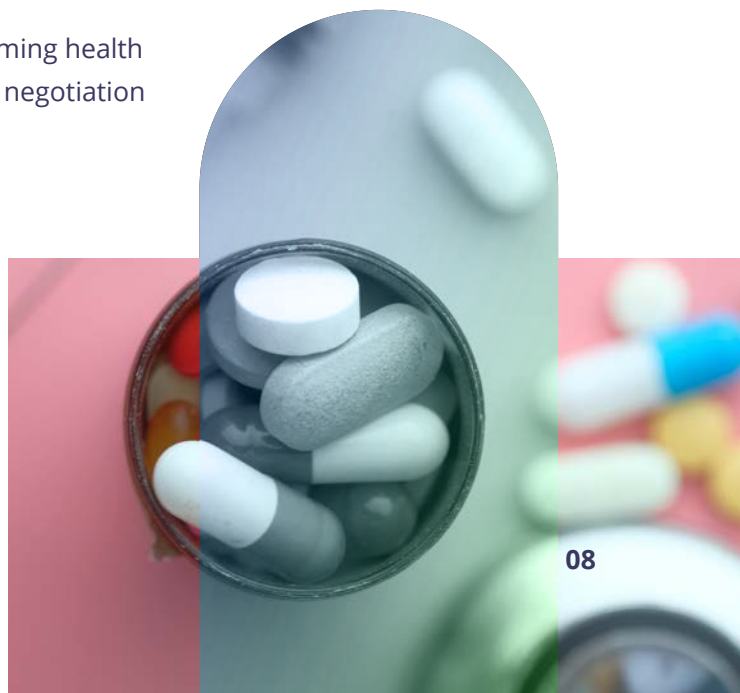
New tools

Being nimble and responsive also means identifying new efficiencies internally and supporting our work using consistent and refined systems.

This year, we’ve focused on creating new tools and analyses, including some to strengthen negotiations and broaden our set of indicators for measuring the impact of the pCPA.

- **Economic insight packages:** to develop standards for pTAP negotiations and increase the level of rigor, consistency and efficiency in preparing negotiation mandates.
- **Negotiation pipeline:** to ensure better foresight of upcoming health technology assessment recommendations, forecasting of negotiation volumes, and proactive human resource planning.

Lower prices for generic drugs benefit not only public drug plans but also private insurers and patients paying out-of-pocket, as generic drug prices are lowered transparently. This means all can enjoy the same, lower prices.



Working together

All stakeholders who are part of the pharmaceutical ecosystem ultimately want the same thing: better health outcomes. With that common goal in mind, we're ramping up efforts to seek out new purpose-driven relationships and enhance existing ones.

Engaging with the Canadian community

This year, we continued to engage with stakeholders, work with partners and contribute our expertise to several working groups, committees and advisory bodies.

- We collaborated with clinicians, patient groups and industry associations to develop [pTAP](#).
- We worked closely with the CGPA to renew [our pricing initiative for generic drugs](#).
- We attended and presented at several events, workshops and conferences. This allowed us to learn from the community and share the work we're leading.
- We participated in a pilot project spearheaded by Canada's Drug Agency to develop ways to include the societal perspective in complex HTA reviews.
- We continued to work closely with Canada's Drug Agency and INESSS, providing ongoing opportunities to share information and best practices.



Supporting and learning from international organizations

In 2023–24, we continued to build relationships with international organizations to exchange best practices on drug pricing models.

- We engaged with Japan’s Ministry of Health, Labour and Welfare. Japan’s Ministry was consulting other countries to see how publicly funded drug plans are evaluated.
- We participated in consultations with Ukraine’s Ministry of Health, discussing pricing policy to support access to effective and affordable drug products.

Interactions and discussions to date have been mostly preliminary. However, we want the pCPA to continue to have an increasing presence within international dialogues about drug negotiation processes.

Enhancing our communications

We recognize the importance of keeping stakeholders up to date on the work we’re leading. All pCPA teams made significant efforts this year to update public-facing documents. We also started publishing news items on [our website](#) and launched [our LinkedIn page](#).



Building on a solid foundation

From embracing a new governance model to increasing internal capacity, this year we strengthened our groundwork and reached new heights.

Developing our team and culture

Our team members are our greatest asset. This year, we focused on building a multiskilled organization that is well-positioned to meet sector challenges and opportunities head-on. By March 2024, the pCPA had a total of 27 employees. This increase in internal capacity allows us to lead more negotiations and better deliver on our important mandate.

From its inception, our new stand-alone organization chose an all-virtual structure. Remote working has allowed us to recruit talented staff from across Canada. The entire organization has embraced the flexibility of remote work, with positive results. We are not only making our virtual environment work — we're thriving in it.

Celebrating visionaries

Our enhanced ability to respond swiftly to opportunities is due to our new organizational model. The important work we're leading as an independent organization would not have been possible without the vision of our then-governing council and those who spearheaded and supported the pCPA's incorporation. We recognized and celebrated these thought leaders at our annual general meeting in late 2023.

- Pam Barnes
- Dominic Bélanger
- Natalie Borden
- Philip Christoff
- Kathleen Coleman
- Marsha Cusack
- Patrick Dicerni
- Stephen Doyle
- Dereck Elkin
- Lori Ellis
- Éric Levesque
- John McGrath
- Suzanne McGurn
- Chad Mitchell
- Mitch Moneo
- Theresa Mrozek
- Donna Mulvey
- Bob Nakagawa
- Carmine Nieuwstraten
- Susan Pierce
- Robert Shaffer
- Luke Spooner
- Mark Wies
- Mark Wyatt



The road ahead

As we move forward with purpose, and with guidance from our Board of Directors, our organization will continue to respond to the opportunities and challenges facing the pharmaceutical and health sectors.

Operational excellence

We'll be focusing on improving productivity as well as growing our team of skilled experts. By developing new tools and analyses, we'll strengthen negotiations and support consistency. We'll also be launching pathways to expedite negotiations, like pTAP, and refining how we report on our many successes.

One-team approach

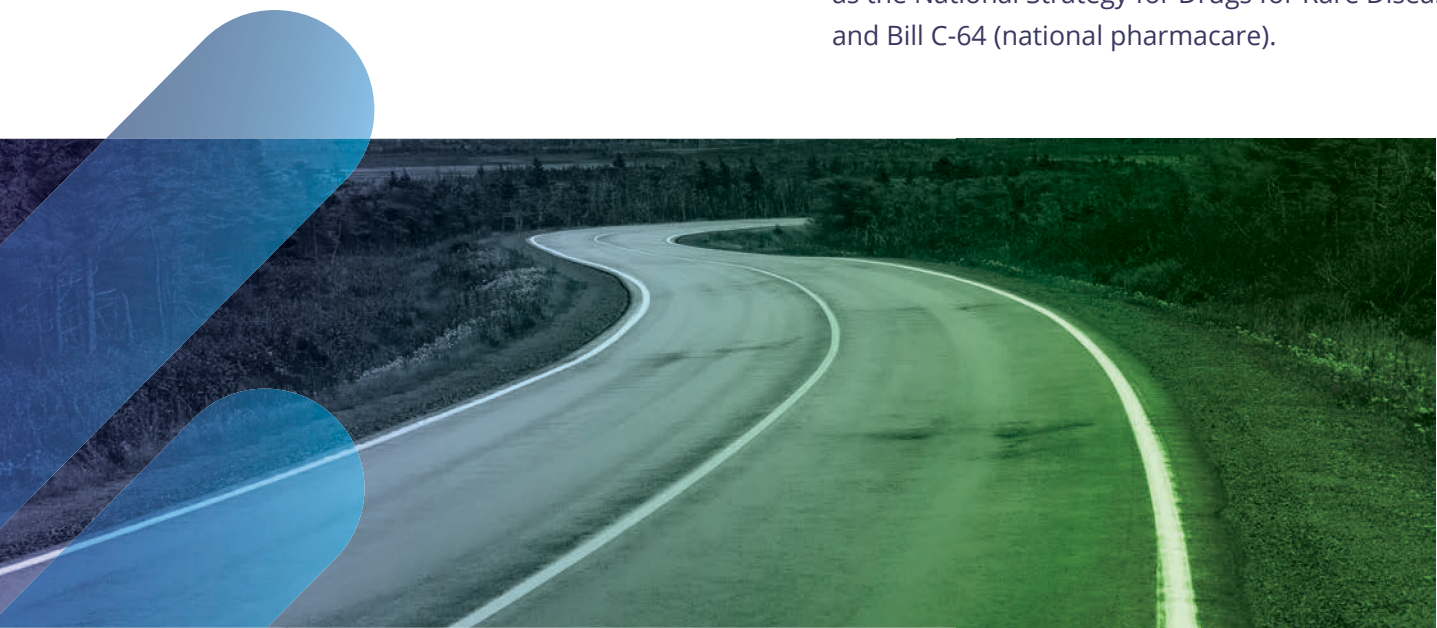
Our expert staff is the force behind the pCPA's long history of achievements. We believe in the importance of building a cohesive team to foster collaboration, grow as an organization and as professionals, and continue to be agile and adaptive. We'll continue to invest in and support the brilliant minds that make us a key stakeholder — and leader — in the drug reimbursement landscape.

Purpose-driven partnerships

Keeping in mind our common goal of better health outcomes, we'll extend engagement activities with various stakeholders on initiatives that align with our strategic priorities. We'll stay connected to the world stage by taking part in international consultations about drug funding and exchanging best practices and lessons learned with other organizations.

Organizational resilience

Our readiness for change will be critical in years to come. We'll find opportunities to continuously evolve — responding to the increased complexity of new drug products and the high number of therapies being developed. We'll also explore how we can work with stakeholders on new governmental initiatives such as the National Strategy for Drugs for Rare Diseases and Bill C-64 (national pharmacare).



Governance

Members

pCPA members include public drug plans from Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland and Labrador, Northwest Territories, Nova Scotia, Nunavut, Ontario, Prince Edward Island, Québec, Saskatchewan, Yukon and the Government of Canada (Non-Insured Health Benefits, Correctional Service Canada and Veterans Affairs Canada).



Board of directors

* As of March 31, 2024

Alberta	Andy Ridge, Assistant Deputy Minister
British Columbia	Mitch Moneo, Assistant Deputy Minister (chair)
Manitoba	Robert Shaffer, Assistant Deputy Minister (vice-chair)
New Brunswick	Éric Levesque, Associate Deputy Minister
Newfoundland and Labrador	Pam Barnes, Director
Northwest Territories	Luke Spooner, Senior Project Manager
Nova Scotia	Vanessa Chouinard, Associate Deputy Minister
Nunavut	Carmine Nieuwstraten, Executive Pharmacy Lead
Ontario	Patrick Dicerni, Assistant Deputy Minister
Prince Edward Island	Marsha Cusack, Senior Manager
Québec	Dominic Bélanger, Director
Saskatchewan	Greg Gettle, Assistant Deputy Minister
Yukon	Cathy McNeil, Assistant Deputy Minister
Federal	Scott Doidge, Director General

Leadership team

* As of March 31, 2024

Chief Executive Officer
Douglas Clark

Deputy CEO and Senior Director, Negotiations and Outcomes
Dominic Tan

Director, Communications, Engagement and Issues Management
Genevieve C. Gagnon

Director, Corporate Services
Gavrielle Tran

Financials

Audited financial statements will be will available on the pCPA website following approval by our members at the annual general meeting in fall 2024.

Special acknowledgements

The insights, contributions and perspectives of a diverse array of stakeholders, partners and supporters allow us to fulfill our important mandate. We thank everyone who contributed to the pCPA's achievements this past year and before.

There is a lot to celebrate this year. We could not have embraced our new model or leveraged new opportunities without the vision and support of our board members, past and present. They have been and remain our guiding light, and we're grateful for their contributions.

We want to give special recognition to outgoing chair Mitch Moneo, who was chair of the governing council at the time of our transition and then acted as the first chair of the pCPA board of directors in 2023. Mitch has been, and continues to be, instrumental in ensuring sound governance of our organization. He played a key role in establishing the pCPA and helped us become the success we are today. Mitch remains an active board member, representing British Columbia.

We're well along on our journey thanks to our wonderful staff. Our team is insightful, passionate and dedicated to achieving great results and meeting the needs of all public drug plans in Canada. Staff members have been incredibly agile as we navigated our revitalization and explored new ways to support our members. We can't wait to continue to grow together.

The pCPA is one part of a greater Canadian drug reimbursement process. We want to thank Health Canada, the Patented Medicine Prices Review Board (PMPRB), Canada's Drug Agency, and the Institut national d'excellence en santé et en services sociaux (INESSS) for their support. Together, we've developed a collegial environment that allows us to fulfill our respective missions.

We also want to acknowledge the commitment and passion of various stakeholders, both as individuals and collectives — from drug manufacturers to patients to clinicians.


As we move from a time of transition to one of momentum, we're building capacity and becoming better positioned to lead more negotiation processes. In alignment with the goals of our strategic plan, we're continuing to identify and build on areas of shared interest and potential collaboration.



pan-Canadian Pharmaceutical Alliance

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 [linkedin.com/company/pan-canadian-pharmaceutical-alliance](https://www.linkedin.com/company/pan-canadian-pharmaceutical-alliance)

This report includes forward-looking statements. These statements reflect current expectations and assumptions regarding the future of the pCPA and that of the pharmaceutical environment. They should not be interpreted as assurance of future focus or work, as our rapidly evolving landscape might lead to new circumstances or priorities for the pCPA.