Making the case for Horizon Scanning

Facing the challenges: Equity, Sustainability and Access

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1

Introduction

Samuel Becket bridge, Dublin

A question to payers

How well do we know the impact of Spinraza (*nusinersen*)?

> Targeted population
> Expert opinions
> Impact on care pathway
> Expected price & budget-impact
> Competitors expected to enter the market

2

Horizon Scanning defined

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Horizon Scanning

- A HSS aims at identifying, filtering, and prioritising new and emerging health technologies with a considerable predicted impact on health, costs, society and the health care system in order to inform policymakers, purchasers, and health care providers or facilitate early access"
(KCE report 2017)

- Performed in some countries e.g. UK, Italy, Denmark, Sweden, Austria and the Netherlands

- Universal need for predictive data: potential to enhance data collection internationally

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The potential of Horizon Scanning

- Improvement of <u>Access</u>
  - ➢ Prioritisation (policies & capacity planning)
    - ➢ Earlier planning for guidelines and registries

  - ➢ Efficiency gains
    - ➢ streamlining procedures from MA -> Prescription (e.g. early access schemes)

- Potential for <u>savings</u>
  - ➢ Budget planning
  - ➢ Creating a level playing field – negotiations
- Early identification – enables <u>collaboration</u>

End-users and how they can use the data

Payers & Policy makers

To inform negotiations
To estimate budget impact
To allow for early dialogue based on a level playing field
To adapt policies ensuring access

Assessment bodies

To prioritise assessments
To plan assessments to ensure minimal waiting time for patients
To allow for early dialogue based on a level playing field

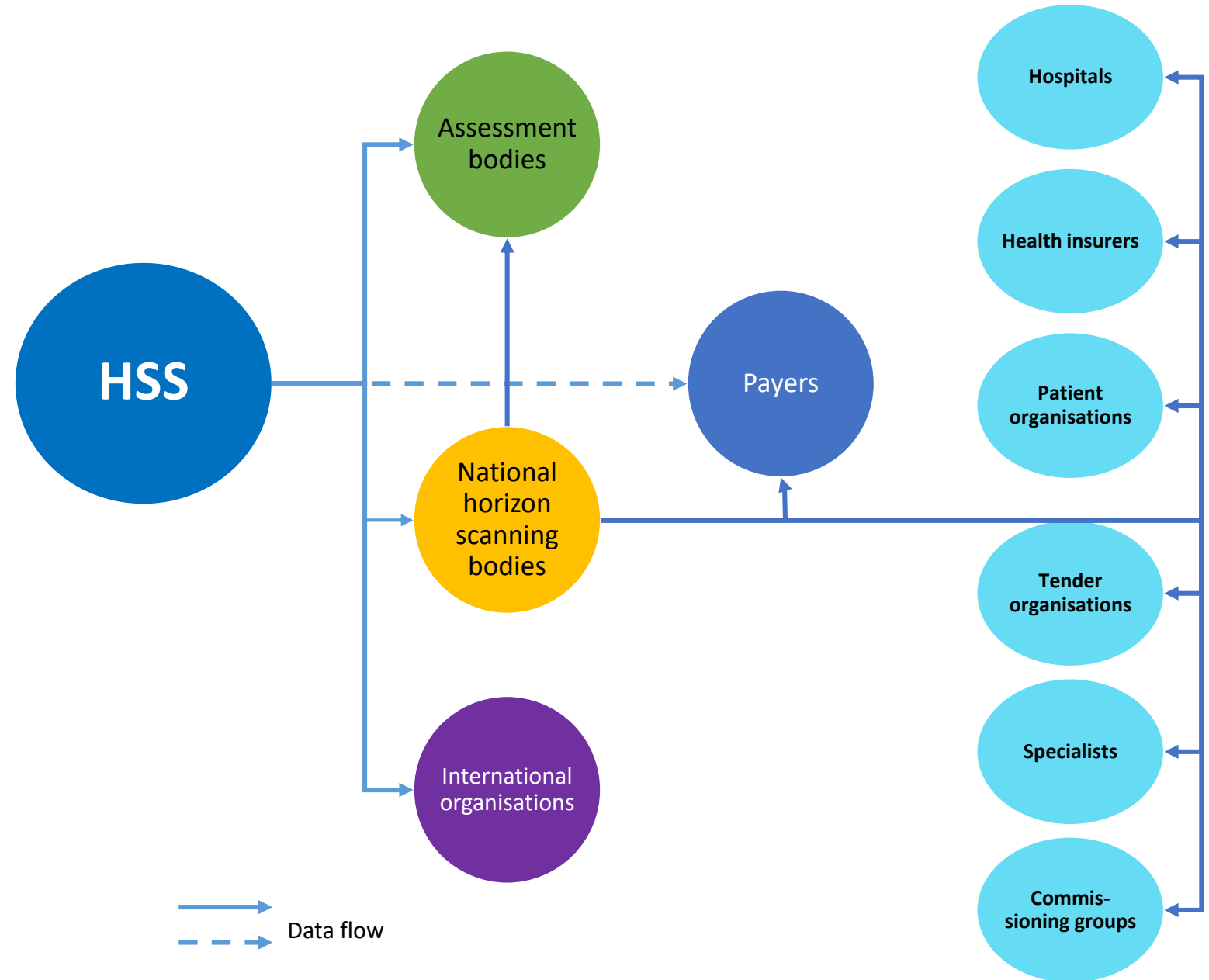**Prescribers Patients Hospitals**

To accelerate guidelines, appropriate use and registries
To inform health services and hospitals of future products and their impact
To inform patients on expectations of upcoming developments

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Data flow

HSS

Assessment bodies

National horizon scanning bodies

International organisations

Payers

Hospitals

Health insurers

Patient organisations

Tender organisations

Specialists

Commis-sioning groups

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3

International Horizon Scanning Initiative

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Rotterdam Central Station (NL)

International Horizon Scanning Initiative (IHSI)

▸ Open to all countries (not limited to Beneluxa)

▸ 10+ countries interested (EU + non-EU)

▸ Dialogue with International organizations on access to data

▸ Solidarity principle: Costs shared based on Purchase Price Parity and population

  ▸ Potential contributions for smaller low-PPP countries as low as € 10.000
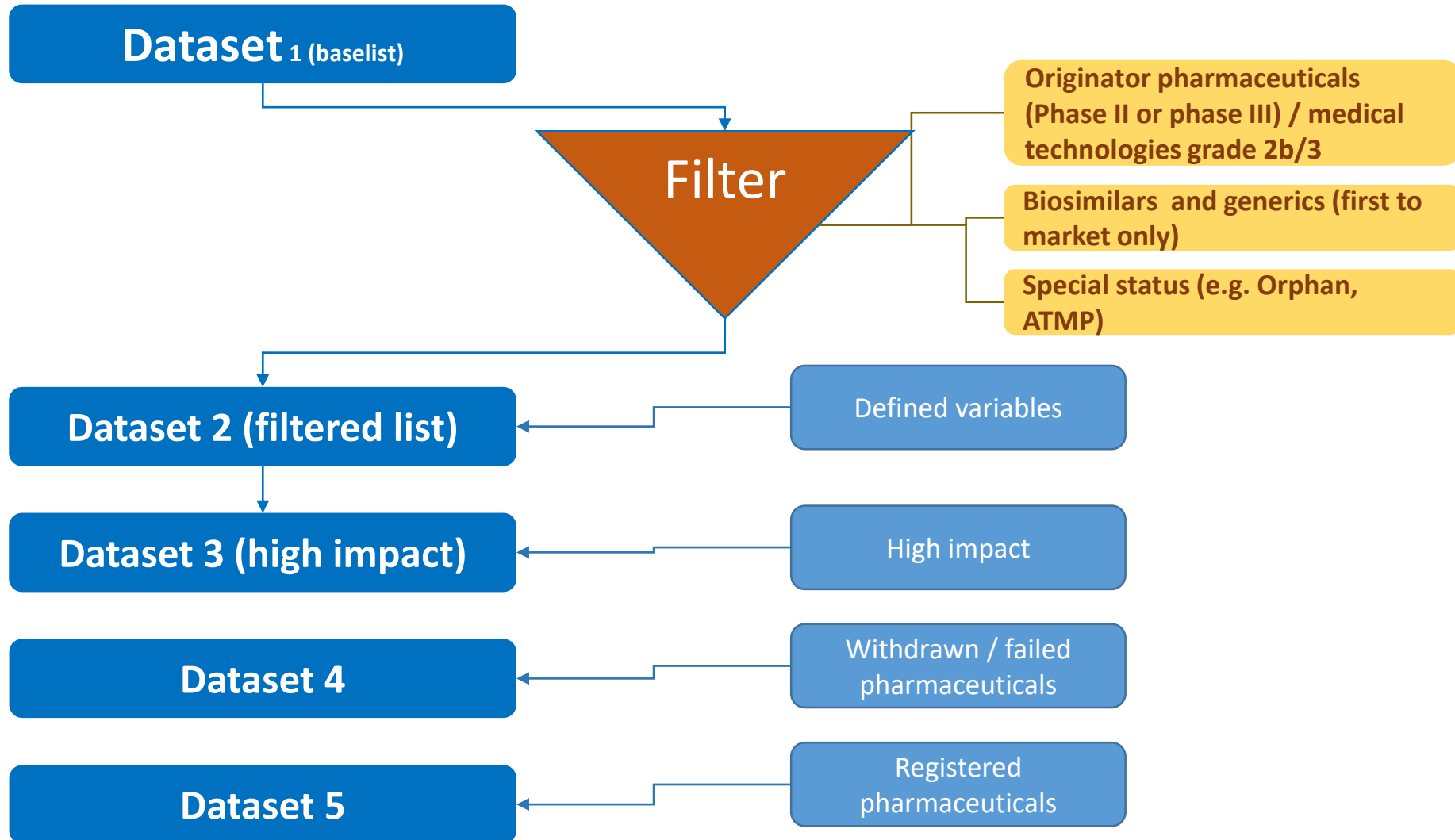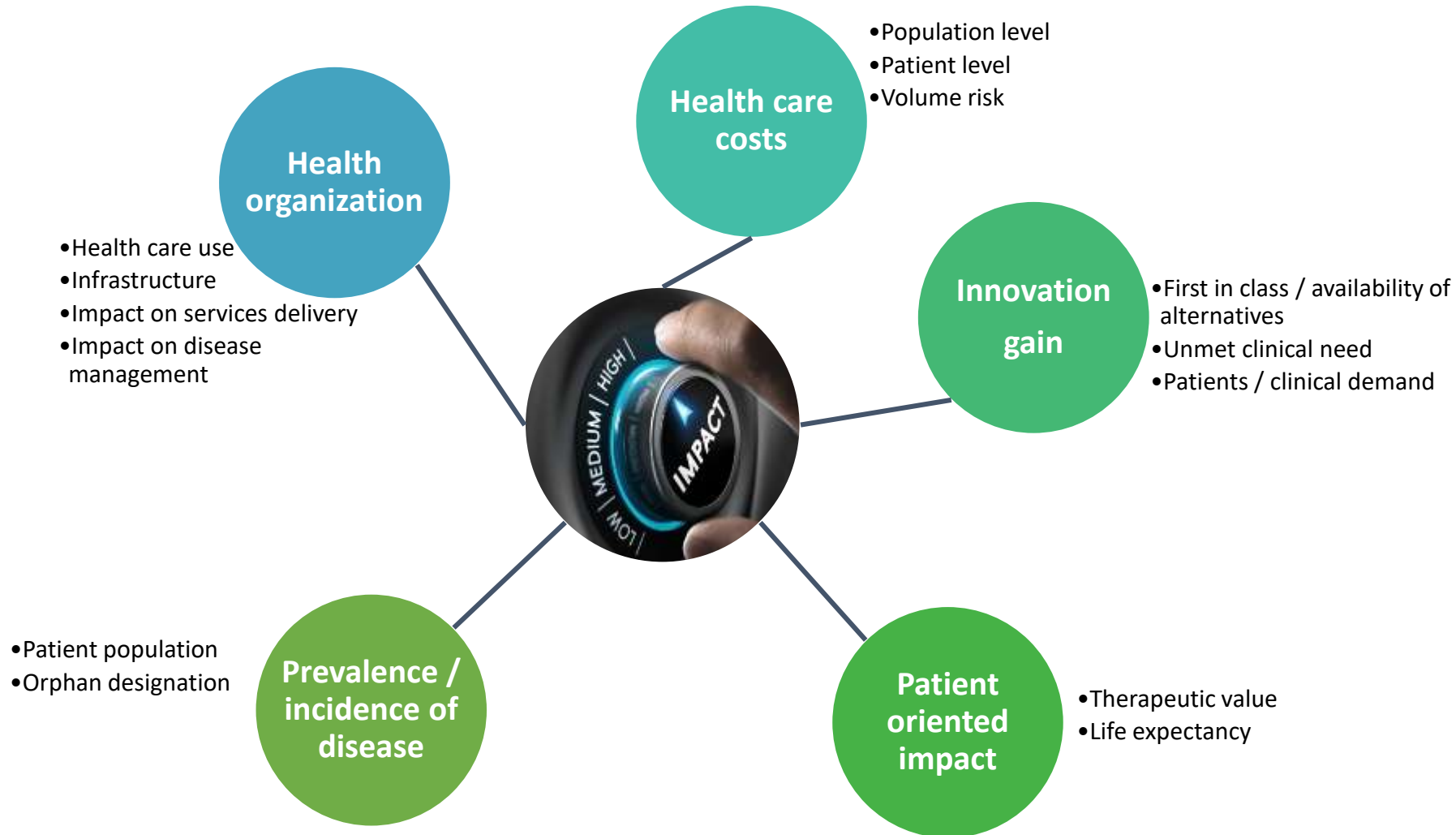
▸ External party to build infrastructure

Data sources

▸ Registries of clinical data

▸ Regulatory authorities including FDA and EMA

▸ Scientific reports and journals

▸ Input from clinical experts and industry

▸ Investor data and outlooks

Horizon scanning database

Dataset 1 (baselist)

Filter

Originator pharmaceuticals (Phase II or phase III) / medical technologies grade 2b/3

Biosimilars and generics (first to market only)

Special status (e.g. Orphan, ATMP)

Dataset 2 (filtered list)

Defined variables

Dataset 3 (high impact)

High impact

Dataset 4

Withdrawn / failed pharmaceuticals

Dataset 5

Registered pharmaceuticals

Parameters for high impact

Health care costs
- Population level
- Patient level
- Volume risk

Health organization
- Health care use
- Infrastructure
- Impact on services delivery
- Impact on disease management

Innovation gain
- First in class / availability of alternatives
- Unmet clinical need
- Patients / clinical demand

Prevalence / incidence of disease
- Patient population
- Orphan designation

Patient oriented impact
- Therapeutic value
- Life expectancy

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Limitations

▸ The HSS does not prioritise for countries

▸ The HSS does not make any decisions on pricing and reimbursement or market entry

▸ Data collected is not tailored to specific countries

▸ Data collected is factual with the exception of the high impact reports

National Horizon Scanning in the Netherlands

▸ Starting point of discussion with all stakeholders

▸ Plays a role in negotiations between health insurance companies and hospitals

  ▸ 71% of hospitals uses the national scan in negotiations with health insurance companies
  ▸ 88% of health insurance companies use the national scan in negotiations with healthcare providers

▸ Starting point for the Ministry of Health to decide which drugs are eligible for managed entry agreements

▸ Hospitals to use data for faster uptake of biosimilars and generics

▸ Data is publicly available

  ▸ Media uses the data for discussion on drug pricing
  ▸ www.horizonscangeneesmiddelen.nl

Planning

▸ Meeting for interested countries December 14, Brussels

▸ Tender published March, 2019
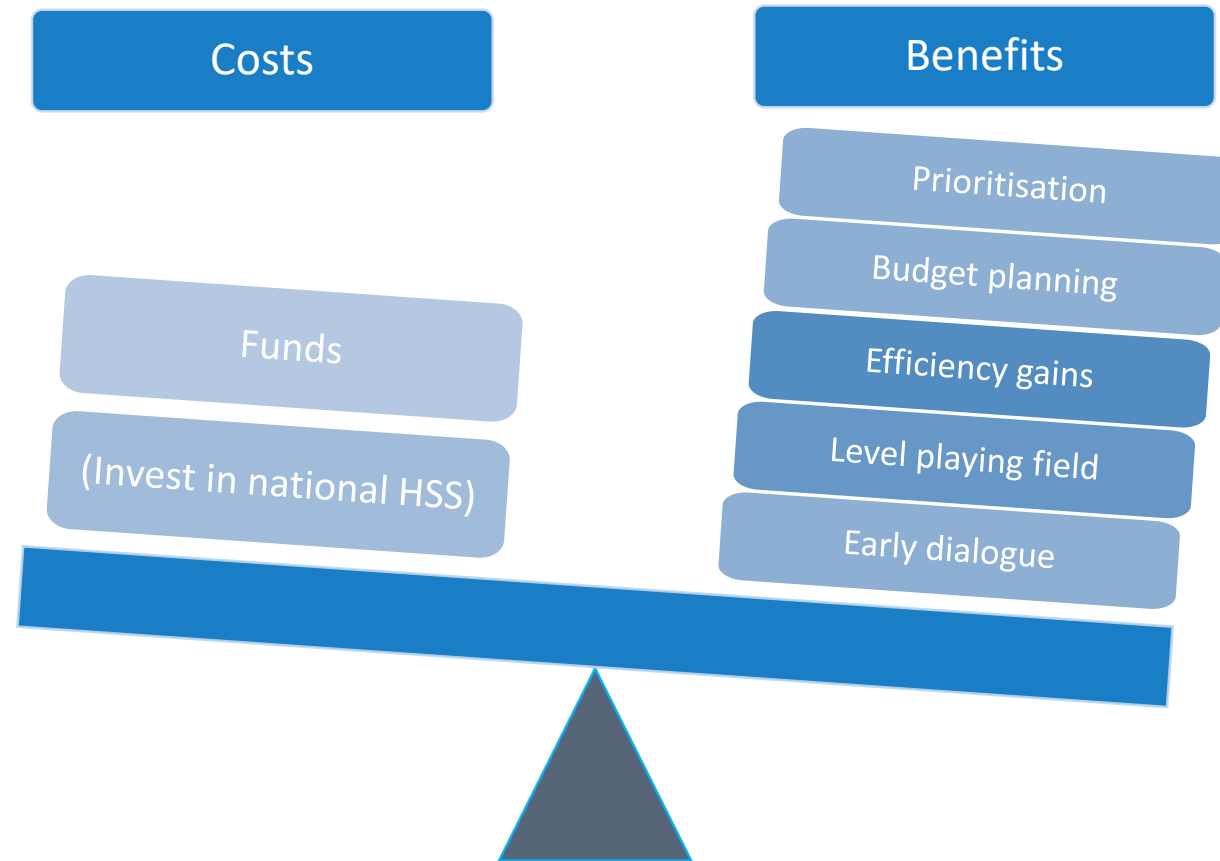
▸ Selection of candidate and start of work mid-2019

5

Conclusion

'Waves of the Donau', Vienna

Business case

Costs
- Funds
- (Invest in national HSS)

Benefits
- Prioritisation
- Budget planning
- Efficiency gains
- Level playing field
- Early dialogue

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If horizons scanning saves 1 and 5% of current expenditure on pharmaceuticals the savings in Europe amount to € 2 and 11 billion.

Country	Total health expenditure (€ millions) (OECD 2018)	% pharmaceutical spent	Pharmaceutical spent (€ millions)	IHSI saving at 1% (€ millions)	IHSI saving at 5% (€ millions)
Austria	38.106,6	12%	4561	46	228
Belgium	43.809,5	15%	6427	64	321
Czech Republic	13762,4	17%	2399	24	120
Denmark	29376,2	7%	1941	19	97
Estonia	1.545,4	19%	294	3	15
Finland	20.608,1	13%	2583	26	129
France	262.105,0	14%	36391	364	1820
Germany	367.831,0	14%	52456	525	2623
Greece	14.869,2	26%	3908	39	195
Hungary	8496,7	29%	2444	24	122
Iceland	1530,7	12%	177	2	9
Ireland	21.021,5	13%	2699	27	135
Italy	152.817,0	18%	27102	271	1355
Latvia	1.683,6	28%	476	5	24
Lithuania	2.642,2	27%	717	7	36
Luxembourg	3.366,7	9%	289	3	14
Netherlands	74.361,6	8%	5662	57	283
Norway	35238,7	8%	2690	27	135
Poland	30799,2	21%	6369	64	318
Portugal	17.344,8	15%	2611	26	131
Slovak Republic	6.000,0	26%	1564	16	78
Slovenia	3.450,1	18%	631	6	32
Spain	102.880,9	19%	19617	196	981
Sweden	49008,7	10%	4806	48	240
Switzerland	72630,7	14%	10030	100	501
United Kingdom	222730,2	11%	25442	254	1272
Total	1.598.016,7		224289	2243	11214

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Horizon scanning: Spinraza

- Budget impact in the Netherlands for total population was estimated above € 100 million per year

- Because of horizon scanning in the Netherlands, Spinraza was not allowed to enter the market before negotiations
  - ➤ Open system for hospital products

- Horizon Scanning allowed for joint negotiations with Belgium

- **1-5% discount on Spinraza would cover NL contribution for Horizon Scanning**

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www.beneluxa.org

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