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WORKING PAPER

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WORKING DOCUMENT

From: General Secretariat of the Council
To: Working Party on Pharmaceuticals and Medical Devices (HTA)


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ADD 2 + ADD3 + COR 1

Subject: Working Party on Pharmaceuticals and Medical devices on 28 January 2019
- Presentation on Horizon Scanning

Delegations will find attached the presentation given on the topic mentioned above at the meeting of the Working Party on 28 January 2019.

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Horizon Scanning

, Beneluxa Coordinator
Ministry of Health, The Netherlands

 = Beneluxa
Initiative on Pharmaceutical Policy



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Introduction

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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, Portugal and the Netherlands

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The case for Horizon Scanning

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De Krook public library, Gent (B)

The potential of Horizon Scanning

- Improvement of Access

- Prioritisation (policies & capacity planning)

- HTA Work planning

- Earlier planning for guidelines and registries

- Efficiency gains

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

- Potential for savings

- Budget planning

- Creating a level playing field – negotiations

End-users and how they can use the data



To inform negotiations

To estimate budget impact

To allow for early dialogue based on a level playing field

To adapt policies ensuring access



To prioritise assessments

To plan assessments to ensure minimal waiting time for patients

To allow for early dialogue based on a level playing field



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

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

National Horizon Scanning in the Netherlands

- ▶ Starting point of discussion with all stakeholders
- ▶ Capacity planning for HTA body
- ▶ 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

A question to experts

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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



Horizon scanning: Spinraza

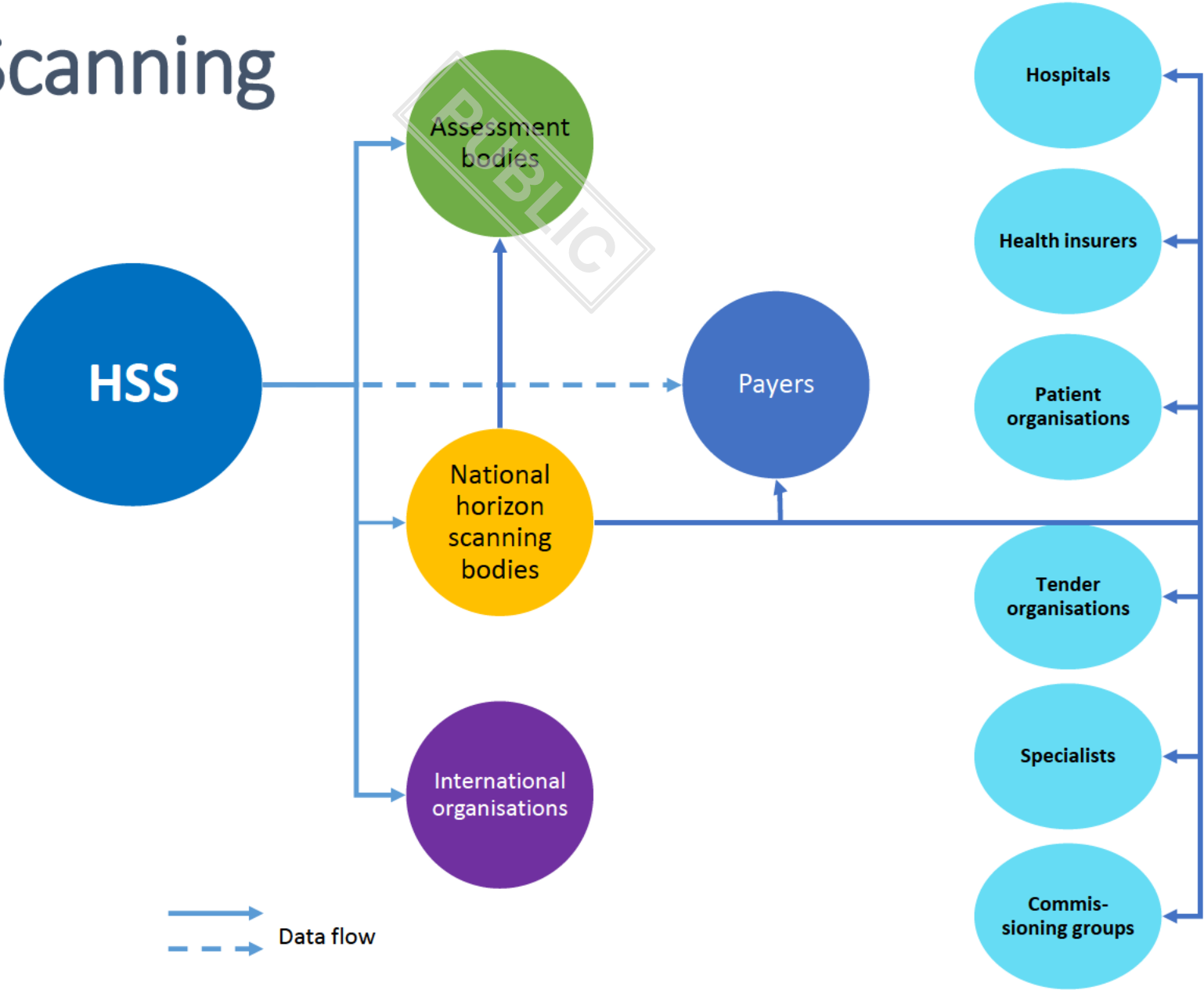
- Budget impact in the Netherlands for total population was estimated above € 100 million per year
- Because of horizon scanning in the Netherlands, Spinraza was not allowed to enter the market before negotiations
 - Open system for hospital products
- Horizon Scanning allowed for joint negotiations with Belgium
- **1-5% discount on Spinraza would cover NL contribution for Horizon Scanning**

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International Horizon Scanning Initiative

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Joint Horizon Scanning



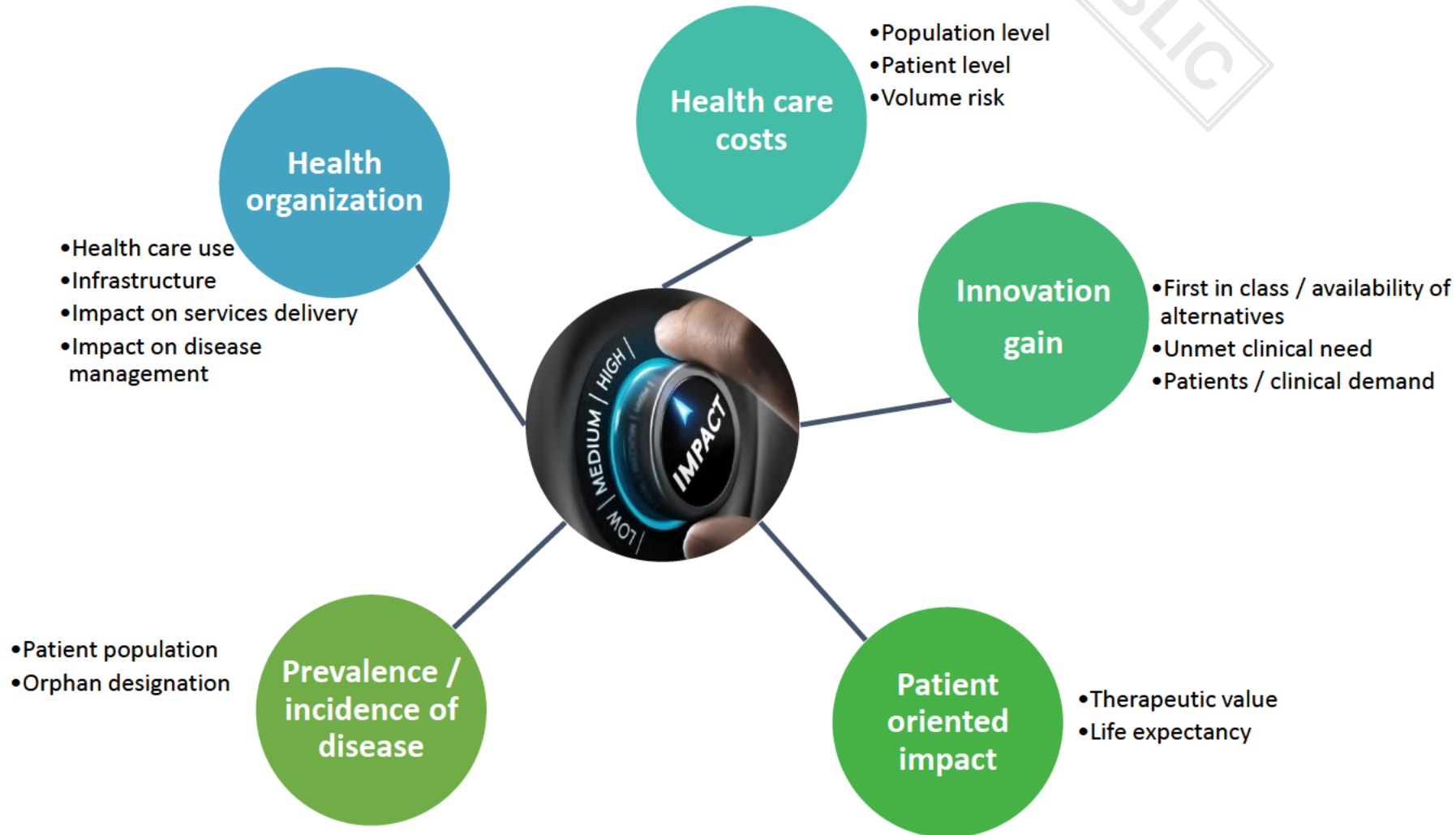
International Horizon Scanning Initiative (IHSI)

- ▶ 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
- ▶ **High Impact Reports and access to unfiltered data**



Parameters for high impact

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Limitations



- ▶ Data collected is not tailored to specific countries
- ▶ Data collected is factual with the exception of the high impact reports
- ▶ The use of information is voluntary
- ▶ The HSS does not make any decisions on pricing and reimbursement or market entry

Planning

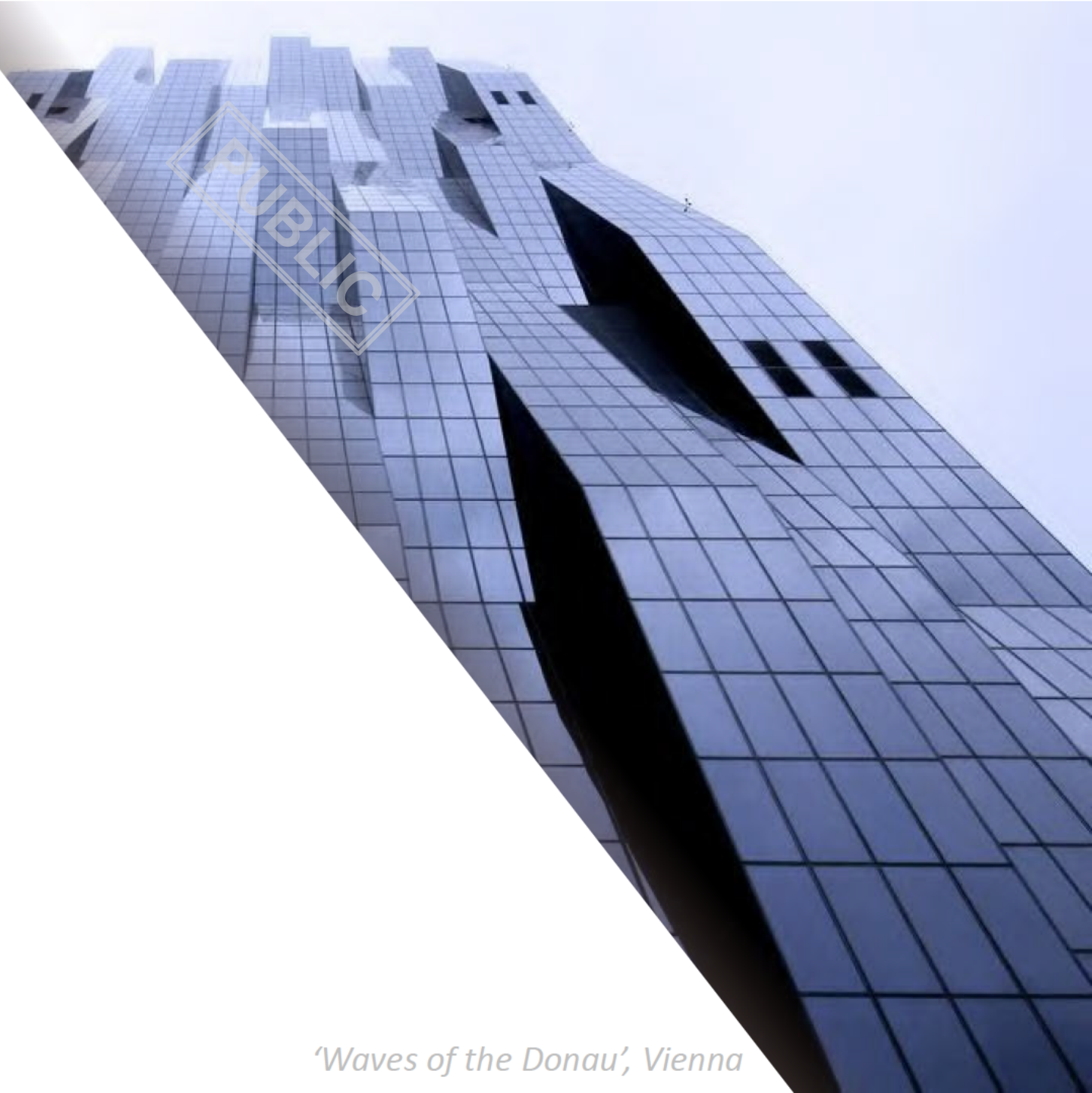
- ▶ Countries can join until February, 2019
- ▶ Tender published March, 2019
- ▶ Selection of candidate and start of work mid-2019

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Conclusion

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Business case

- Horizon scanning requires significant resources
- Identical sources and information serves many purposes
- Outcomes are equally relevant for most countries (in Europe)
- Universal need for predictive data: potential to enhance data collection internationally
 - Horizon scanning is by default a low-threshold collaboration
 - Limited scope of horizon Scanning is a waste of resources



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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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