Making the case for Horizon Scanning

Facing the challenges: Equity, Sustainability and Access

Aldo Golja, Beneluxa Coordinator
Ministry of Health, The Netherlands
Introduction
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
Horizon Scanning defined
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
The potential of Horizon Scanning

• Improvement of Access
  ➢ Prioritisation (policies & capacity 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

• Early identification – enables collaboration
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
Data flow

- HSS
  - Assessment bodies
  - National horizon scanning bodies
  - International organisations
    - Payers
      - Hospitals
      - Health insurers
      - Patient organisations
      - Tender organisations
      - Specialists
      - Commissioning groups

Data flow
International Horizon Scanning Initiative
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)

Dataset 2 (filtered list)

Dataset 3 (high impact)

Dataset 4

Dataset 5

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)

Defined variables

High impact

Withdrawn / failed pharmaceuticals

Registered pharmaceuticals
Parameters for high impact

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

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

- **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
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

Facing the challenges: Equity, Sustainability & Access - Lisbon, November 28-29, 2018
If horizons scanning saves 1 and 5% of current expenditure on pharmaceuticals the savings in Europe amount to €2 and 11 billion.

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

Info@beneluxa.org

For more information go to:

www.beneluxa.org

Aldo Golja & Eveline Klein Lankhorst
Senior Policy Advisors
Ministry of Health, Welfare and Sports, the Netherlands

aa.golja@minvws.nl