

Medicines

Facing the Challenges: Equity, Sustainability and Access

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Horizon Scanning

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OUR CONTEXT




OUR HORIZON SCANNING PURPOSES

- Plan internal activity & resource allocation
- Increase knowledge on specific therapeutic areas (prescription patterns, epidemiology, etc)
- Support price negotiation and managed entry agreements
- Support expenditure forecasting

OUR CURRENT SOURCES



More Time
More uncertainty



Query to pharmaceutical industry

NEW SUBSTANCES/NEW INDICATIONS

Therapeutic Indication

Were or are there Clinical Trials taking place in Portugal?

In your view, does this medicine fill a therapeutic gap?

Duration of treatment (in months)?

Marketing Authorization or Extension of Indication expected date

It is expected that it will change the provision of care to patients?

Novel mechanism of action?

Number of expected eligible patients for treatment in Portugal?

Expected submission date of financing request

Orphan designation

Available Therapeutic Alternatives?

Annual estimate of the cost of treatment per patient?

NEW GENERIC/BIOSIMILARS

Besides innovation we wanted to identify...

- Therapeutic areas where we will have a competitive market
- Estimate potential savings from upcoming patent expiries

RESULTS

135 pharma industry replies

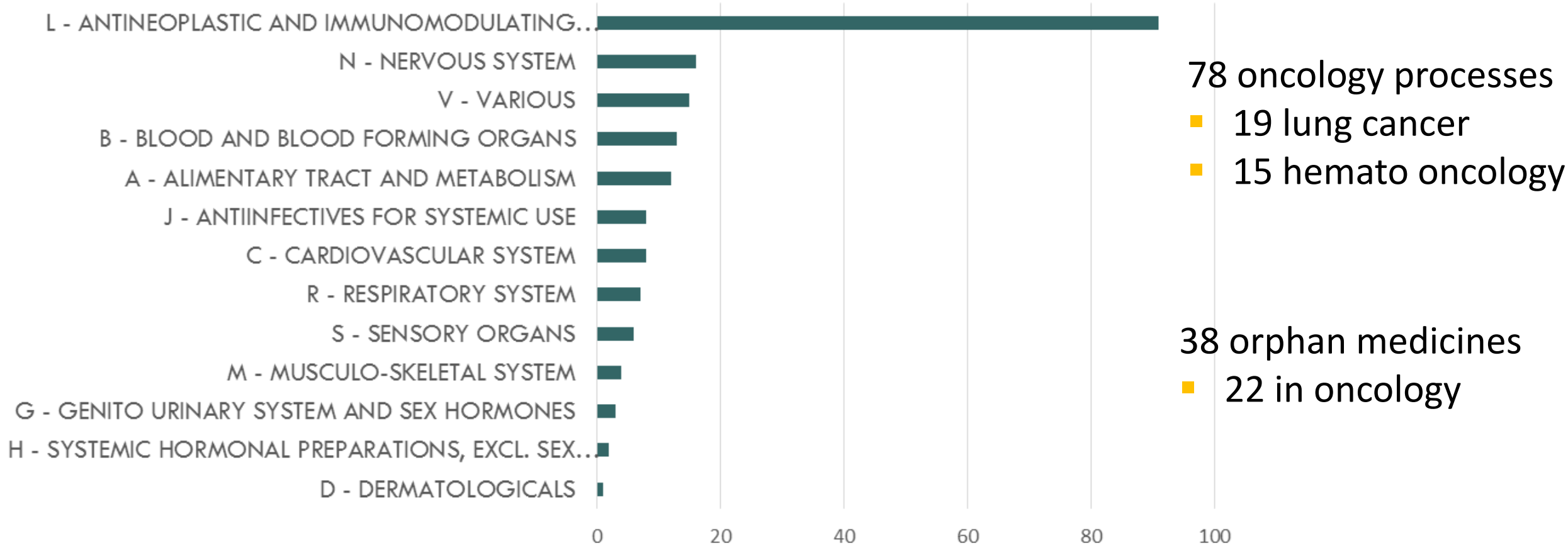
18 month period:

- 180 submissions of new medicines /new indications
- 30 submissions of new generic/biosimilars

140 Hospital setting (new medicines /new indications)

THERAPEUTIC AREAS

ATC



NEW GENERICS/BIOSIMILARS

Competition on a segment of 200 M€

- 10% of NHS expenditure with medicines
- Mainly Oncology medicines



■ Hospital

■ Pharmacies

WHAT ARE WE DOING

- Planning internal activity
- Prepare financing decisions (negotiation, price, expenditure cap, duration of contract, market share, etc)

WHAT IS STILL A CHALLENGE

- Information regarding price
- Predict market adoption of the new technology
- Share information with health services

Thank you

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