Horizon Scanning

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OUR CONTEXT

Clinical Trials

Marketing Authorization & Pharmacovigilance

Pricing & HTA

Negotiation & Reimbursement

Utilization & Expenditure Monitoring
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

- Horizon scanning from other institutes
- Conferences, Clinical experts, patient Associations, etc
- Query to pharmaceutical industry
- Social media
- European Medicine Agency

More Time
More uncertainty
Query to pharmaceutical industry
<table>
<thead>
<tr>
<th>Therapeutic Indication</th>
<th>Were or are there Clinical Trials taking place in Portugal?</th>
<th>In your view, does this medicine fill a therapeutic gap?</th>
<th>Duration of treatment (in months)?</th>
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<tbody>
<tr>
<td>Marketing Authorization or Extension of Indication expected date</td>
<td>It is expected that it will change the provision of care to patients?</td>
<td>Novel mechanism of action?</td>
<td>Number of expected eligible patients for treatment in Portugal?</td>
</tr>
<tr>
<td>Expected submission date of financing request</td>
<td>Orphan designation</td>
<td>Available Therapeutic Alternatives?</td>
<td>Annual estimate of the cost of treatment per patient?</td>
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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

L - ANTINEOPLASTIC AND IMMUNOMODULATING...
N - NERVOUS SYSTEM
V - VARIOUS
B - BLOOD AND BLOOD FORMING ORGANS
A - ALIMENTARY TRACT AND METABOLISM
J - ANTIINFECTIVES FOR SYSTEMIC USE
C - Cardiovascular System
R - RESPIRATORY SYSTEM
S - SENSORY ORGANS
M - MUSCULO-SKELETAL SYSTEM
G - GENITO URINARY SYSTEM AND SEX HORMONES
H - SYSTEMIC HORMONAL PREPARATIONS, EXCL. SEX...
D - DERMATOLOGICALS

78 oncology processes
- 19 lung cancer
- 15 hemato oncology

38 orphan medicines
- 22 in oncology
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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