PRICESpective
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HTA Level of influence: to what extent do HTAs influence market access decisions across geographies

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Presenter: Keiron Sparrowhawk – PriceSpective
Panellists: Daniel Hodyc – ADVANCE Healthcare Management Institute
Finn Børlum Kristensen – EUnetHTA
Iga Lipska – Polish HTA Department

Agenda

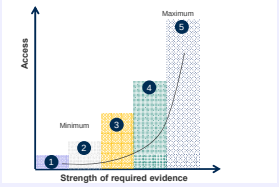
Agenda Item	Responsible	Time
Introduction Top line explanatory overview of HTAs and drug evaluation in Europe, and introduction to potential cross geographic influences for market access decisions	Keiron Sparrowhawk	5 mins
Panel Presentation and HTAs Overview Introduction of the panel and overview of HTAs in Czech Republic and Poland	Panel	5-10 mins
Round Table Discussion Discussion amongst the panellists regarding the extent to which HTAs influence each other across Europe, and particularly, from the most "established" HTAs to the CEE markets	Panel & Keiron Sparrowhawk	20 mins
Audience Discussion Q&A session with the public	Panel & Public	15-20 mins
Conclusions Conclusions and thoughts about the what does the future hold for EUnetHTA	Keiron Sparrowhawk	5 mins

With raising budgetary pressures, payers increasingly rely on HTAs to assist decision making and budget allocation

Some health care providers concerns include:
- Increasing health care burden & distribution of scarce resources
- Quality
- Affordability
- Value for money

Across Europe, many health care providers have turned to health technology assessment as a means to allocate funding and ensure value for money

Access decisions are increasingly based on robust data requirements and thorough evaluations



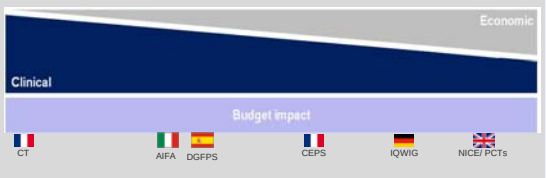
Access Score Definitions EU5	
5	Reimbursed per regulatory label
4	Reimbursed for majority of label population
3	Restrictions excluding several groups from reimbursement
2	Severe restrictions; reimbursement limited to high need
1	Not reimbursed

- Obtaining full market access in Europe has become increasingly challenging
- HTAs often ask:
  - In which patient population was the drug tested?
  - What are the health outcomes?
  - What comparator was tested?

Countries have set up their own independent HTA bodies, which assess new drugs in different ways according to local circumstances and context

Therefore, HTA agencies across Europe differ in their approach and complexity in terms of drug evaluation

Example: in the EU5



There are evident differences in approach to drug evaluation across the main EU markets, mainly due to differences in the accountability of the economic perspective

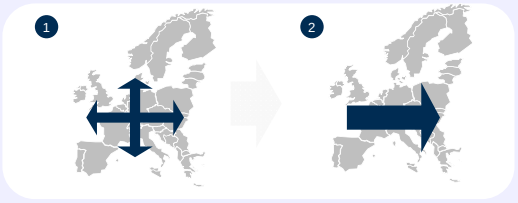
As a result, we also observe different outcomes from drug evaluations across HTAs

Brand name	Glivec	Tasigna	Avastin	Revlimid	Tyverb	Lucentis	Rasilez	Byetta
Molecule	Imatinib	Nilotinib	Bevacizumab	Lenalidomide	Lapatinib	Ranibizumab	Aliskiren	Exenatide
Therapy area	Oncology	Oncology	Oncology	Oncology	Oncology	Ophthalmology	CV	Diabetes
UK	●	✖	✖	●	✖	●	✖	●
FR	●	●	●	NA	●	●	●	●
IT	●	●	●	●	●	●	●	●
ES	●	●	●	●	●	●	●	●
CZ	●	●	●	●	●	●	●	●
POL	●	●	●	●	●	●	✖	✖

Key: Approved for reimbursement as per indication ● Moderately restricted ● Severely restricted ● Not approved ✖

NICE is known for being one of the most, if not the most restrictive HTA in Europe due to the emphasis allocated to cost-effectiveness, with half of these drugs being blocked from funding and 25% being severely restricted

To what extent do we believe that HTAs may influence one another?



Intra- EU

- **Established evaluation processes**
- **Different approaches**
- **Experience**

West→ CEE

- **Lack of resources**
- **Affordability**
- **Negative evaluations (NICE)**

Different approaches to drug evaluation may be a limiting factor for cross-geographic influences amongst the most 'established' HTAs. However, such influence is perhaps more evident towards the 'evolving' countries in the HTA domain like the CEE markets

Panel

Presentation of the panel

Panel

Daniel Hodyc

Ex-Consultant for Ministry of Health in Czech Republic

Responsibilities focused on reimbursement mechanisms and contracting
- Cooperated on the preparation of Reimbursement Directives and introduction of DRG
- Prepared the HTA development project in the Czech Republic

Iga Lipska

Director of Polish HTA Department

Responsible for HTA process management in Poland
- Management of research analysts
- Establishment of the institutional framework for HTA reports
- Decision making and implementation for drug reimbursement lists in Polish health care system

Finn Boerlum Kristensen

Chairman of the Executive Committee, EUnetHTA, and Director of its Coordinating Secretariat, National Board of Health, Denmark
- Chair, Scientific Council, Ludwig Bolzmann Institute of HTA, Austria since 2007
- Member, UK NHS HTA Programme Advisory Group since 2005
- Editor of HTA Handbook, 2007 and chief editor of three peer-reviewed publication series from DACEHTA

Audience