IQVIA INSTITUTE FOR HUMAN DATA SCIENCE

BIOSIMILAR SCORECARD 2020
DENMARK

CONTRIBUTION OF BIOSIMILARS

MOLECULE	LEVEL OF COMPETITION	PRICE EVOLUTION	VOLUME DEVELOPMENT
	1=Low, 5=High	*1=Low, 5=High*	*1=Low, 5=High*
Anti-TNF			5
Adalimumab	4	5	5
Infliximab	1	5	5
Etanercept	2	5	5
Insulin Lispro	N/A	N/A	N/A
Insulin Glargine	2	2	5
Rituximab	5	3	1
Trastuzumab	3	5	5
	Indicator of the amount of competition based on the number of competitors and their respective market shares	*Net price reduction from average price of the countries in scope 1 year before first biosimilar entry*	*Change in biologic volume since biosimilar entry*

SUSTAINABILITY SCORECARD

POLICY AREA	SUSTAINABILITY MEASURE	CURRENT COUNTRY STATUS
		1=Low, 5=High
Regulatory environment and clinical guidelines	Time from EMA approval to first biosimilars sales	4
	Treatment guidelines for biosimilar use	5
	Physician switching policies	5
	No biologic pharmacy substitution	3
Awareness and education	Comprehensive training /education for patient	5
	Comprehensive training /education for physician	5
Incentives	Patient incentives to promote biosimilar use	3
	Prescription quotas or financial incentives for providers that do not restrict physician choice	2
Pricing rules and dynamics	Originator price not subject to mandatory price cuts	5
	Molecule pricing not subject to reference price	1
Purchasing mechanisms	Length of contracts	5
	Tender timing relative to biosimilar availability	5
	Time from tender award to delivery	5
	Number of winners	1
	Winner decision criteria beyond price	1

BIOSIMILAR SCORECARD: DENMARK

POSITIVE POLICY ELEMENTS

1. Denmark has succeeded in achieving widespread acceptance by payers, providers and patients of biosimilars as an integral part of medicine use.
2. Biosimilars are introduced very rapidly and competitive market dynamics between biosimilar manufacturers and originator manufacturer are quickly achieved.
3. Manufacturers winning a tender are assured of their product gaining the expected market volume.
4. Clinical use guidelines are reviewed and revised as appropriate following introduction of biosimilars.

POLICY CHALLENGES

1. Supply shortages are a risk due to the burden placed on manufacturers tendering for a contract and their need to be prepared to provide full supply in the event they win the tender.
2. A tender system with one winner taking all of the market for the molecule may reduce the attractiveness of the Danish market and therefore result in fewer competitors over time.

POTENTIAL POLICY SOLUTIONS

1. Consistently awarding multiple tender winners rather than a single winner can result in more manufacturers being willing to bid and therefore intensifying the level of competition.
2. Competition dynamics can be strengthened by improving tender communications, including early announcement of dates and timelines, as well as providing sufficient time from award to contract start

Denmark Biosimilar Scorecard prepared June 2020.

All analysis based on 12 months ending Q1 2020. In cases where information is unavailable, scores are left blank.

For information on methodology supporting the scorecard metrics and statements, please see the Appendix document at www.iqviainstitute.org/biosimilarscorecards

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