IQVIA INSTITUTE FOR HUMAN DATA SCIENCE

BIOSIMILAR SCORECARD 2020
THE SUSTAINABLE MARKET

CONTRIBUTION OF BIOSIMILARS

MOLECULE	LEVEL OF COMPETITION	PRICE EVOLUTION	VOLUME DEVELOPMENT
	1=Low, 5=High	*1=Low, 5=High*	*1=Low, 5=High*
The most recent launches in the European market	An indicator of the level of competition for a molecule	Evolution of price level since start of biosimilar competition	An indicator of additional access generated since the start of biosimilar competition
7 molecules covering anti-TNFs (adalimumab, infliximab, etanercept), insulins (insulin glargine and lispro), and oncology (trastuzumab, rituximab)	*Using a Herfindahl index to evaluate the level of competition in the market for a molecule, based on competitors' market shares*	*Net price reduction compared to list price before biosimilar competition, collected where available*	*Increased number of treatment days (TD) per capita in Q1 2020 versus the year before biosimilar entry*

SUSTAINABILITY SCORECARD

POLICY AREA	SUSTAINABILITY MEASURE	SUSTAINABLE MARKET STATUS
Regulatory environment and clinical guidelines	Time from EMA approval to first biosimilars sales	Instant or very short market entry after approval
	Treatment guidelines for biosimilar use	Publication of multiple guidelines on usage and protocols prior to first biosimilar entry
	Physician switching policies	Authorisation and guidance of physician-led ability to switch to a biosimilar medicine at entry of first biosimilar on the market
	No biologic pharmacy substitution	No biologic pharmacy substitution allowed
Awareness and education	Comprehensive training / education for patient	Access to comprehensive and unbiased training or education prior to first biosimilar entry
	Comprehensive training / education for physician	
Incentives	Patient incentives to promote biosimilar use	Incentives in place to encourage use of most economically advantageous product upon introduction of competition
	Prescription quotas or financial incentives for providers that do not restrict physician choice	An incentive or quota that does not restrict physician choice
Pricing rules and dynamics	Originator price not subject to mandatory price cuts	No forced originator price cuts by central authorities required, market forces to determine price
	Molecule pricing not subject to reference price	No reference price determined by central authorities, market forces to determine price
Purchasing mechanisms	Length of contracts	12- to 24-month contracts ensure market competitiveness and avoid patients are switched often
	Tender timing relative to biosimilar availability	Tender opens upon introduction of competition
	Time from tender award to delivery	4-6 months lead time to allow necessary preparations and stock build-up
	Number of winners	Consistently award multi-winner tenders to allow of market sustainability
	Winner decision criteria beyond price	Decision based on the most economically advantageous tender offers (e.g. incorporating sustainability, price, product characteristics, continuity of supply)

THE SUSTAINABLE MARKET

POSITIVE POLICY ELEMENTS

Selected country policy elements that positively influence Biosimilar Sustainability.

POLICY CHALLENGES

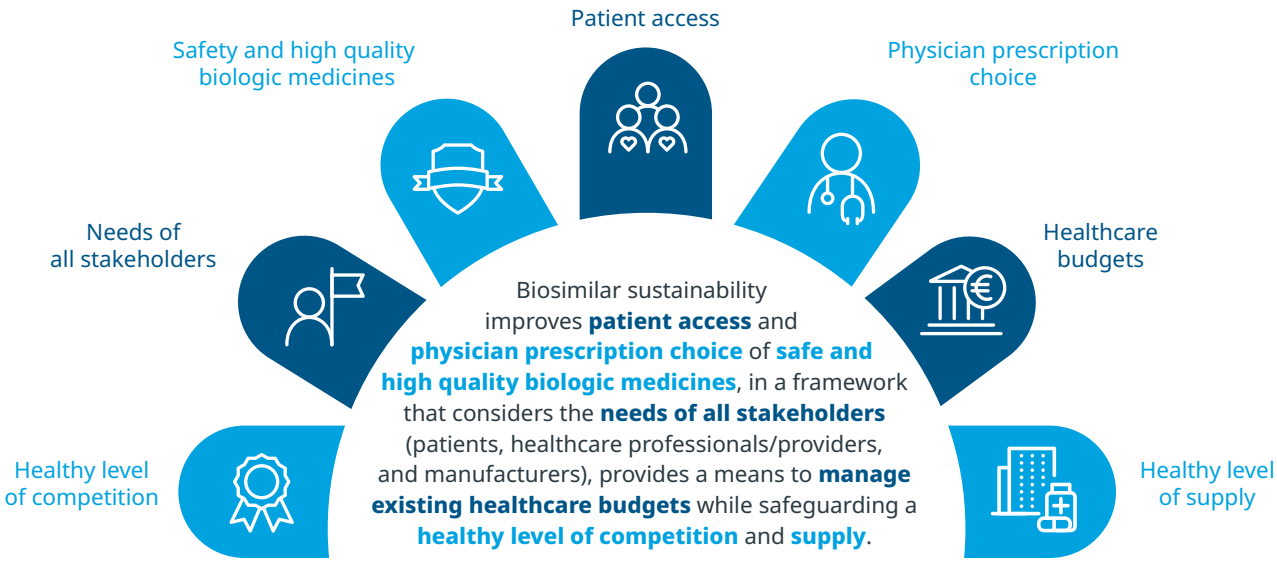
Most-urgent country policy challenges that require action in order to achieve Biosimilar Sustainability.

POTENTIAL POLICY SOLUTIONS

Suggested country policy actions to address challenges and improve Biosimilar Sustainability.

A MULTI-STAKEHOLDER DEFINITION OF SUSTAINABILITY

for the biosimilars marketplace



The Sustainable Market Scorecard
is a representation of how the ideal market place should perform to ensure optimal market sustainability and patient-focus.

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

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