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# Biosimilars: EU Payer Perspectives

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## Abstracts

Leading European payer experts reveal the real impact of biosimilars over the last 12 months

Keeping track of the dynamics and nuances of the biosimilars market is critical – not least because the $232 billion global biologics market is now seriously under threat. New biosimilar entrants have been taking on the European biologic brands for the last decade. The difference is: now they're winning.

Are you keeping up with the recent step change in the biologics marketplace?

Despite the best efforts of the doom-mongers, the clouds hanging over biosimilars have lifted. Payers, doctors and even patients are no longer wary. After nearly a decade, the positive experiences across Europe have multiplied; costs have plummeted; patients are switching; and treatment rates have steadily gone up. The penny has finally dropped: biosimilars are not a problem. So how will you respond?

What to expect from this report

Biosimilars: EU Payer Perspectives gives the inside track on the biosimilars market today, offering new information to help you stay ahead. For this report, we've spoken directly to 10 high-profile payer decision-makers and reimbursement influencers across Europe. These are the people who define and execute the formulary decisions and payer strategies that reverberate across the pharma landscape. What they think matters.

This 87-page report covers how the European market has changed over the last 12 months as well as offering expert payer views on current practice and what is likely to happen next. Key issues discussed include regulatory policy and frameworks,

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commercial tactics and pipeline launches.

20 current issues of most interest to pharma were uncovered during preliminary research

We used these to pose an average of 36 targeted questions of each expert

Their responses provided 37 unique new insights

Insights are supported by 242 directly quoted comments

Issues covered in this report

Key events in the European biosimilars market

The demand and need for biosimilars education

Delivering effective and tailored biosimilars education

The value of local-level educational initiatives

The European regulatory framework for biosimilars

The evolution, challenges and opportunities with biosimilar switching

Current views on the potential for pharmacy-level substitution

The impact of biosimilars on the European prescribing environment

European payer tactics used to drive biosimilar adoption

Local initiatives and their influence on biosimilar adoption rates

The evolution of payer and originator tactics in the future

The impact of complex biosimilar launches in Europe

Key challenges in the introduction of complex biosimilars

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- Insights into the commercial strategies of biosimilar companies
- Uncovering the reasons behind the UK’s success in introducing biosimilars
- The success (or failure) of originator company biosimilar defence strategies
- Future adoption drivers of Remicade, Enbrel and MabThera biosimilars in Europe
- Opportunities and challenges in relation to Herceptin biosimilars
- Opportunities and challenges in relation to Humira biosimilars
- Future challenges and opportunities in the European biosimilars market

Example insight included in Biosimilars: EU Payer Perspectives

'Aligned with evolving national policies, the commercial tactics employed by payers are becoming increasingly aggressive toward biosimilars. Tenders have become the go-to strategy being used by payers in Europe to ensure rapid adoption of biosimilars. A direct consequence of this is that price has become the only commercial lever that companies can pull in order to differentiate themselves from other companies, with other offerings (e.g. devices, patient support services, etc.) seen as minimally influential. National initiatives which 'gamify' biosimilar adoption rates have also been hugely successful.'

Example quote included in Biosimilars: EU Payer Perspectives

'There have been huge cost savings over the last two years, since infliximab, etanercept and MabThera biosimilars have reached the UK market. The rate of growth at the complex biologics end of the pharmaceuticals market has levelled off to a certain extent; we've gone from a 12-15 percent year-on-year increase in spending to a 2-3 percent increase in the last financial year and that's mainly due to the availability of biosimilars.'

The expert panel interviewed for Biosimilars: EU Payer Perspectives

- Former Vice-Chair of the Economic Affairs Committee of LEEM; currently

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working as an independent consultant, France

Former Research Director, scientific and technological institute within the French Ministry of Health; currently working as a consultant for a large regional payer, France

Former member of the Transparency Committee, HAS; currently working as a senior member of a regional clinical research centre, France

Head of Drug Reimbursement; large regional payer, Germany

Associate Member of the Drug Commission of the German Medical Association, Germany

Full Member of the Drug Commission of the German Medical Association, Germany

Chief Pharmacist; cancer specialist hospital, South East England, UK

Clinical Director, Pharmacy and Prescribing; pricing and reimbursement organisation, UK

Specialist Procurement Pharmacist; large NHS Trust, North East England, UK

Senior leadership team member, Spanish Association of Biosimilars (BioSim), Spain

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Branded drug manufacturers must work harder to deliver value in order to compete successfully against biosimilars—and understanding what lies behind changing payer opinion is a key part of any successful strategy.

Why FirstWord reports are different

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Entirely new information: Because our reports are based on interviews conducted in the last few weeks, the insights and analysis are fresh and new. This is a perspective you simply can't source anywhere else.

Driven by the needs of pharma: Our professional researchers and writers are industry specialists who are proficient at delving into the detail and discovering answers to the key questions pharma needs to ask.

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