

BIOSIMILAR SCORECARD 2020 THE NETHERLANDS

CONTRIBUTION OF BIOSIMILARS

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

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	5
	Treatment guidelines for biosimilar use	5
	Physician switching policies	5
	No biologic pharmacy substitution	3
 Awareness and education	Comprehensive training /education for patient	4
	Comprehensive training /education for physician	4
 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	5
 Purchasing mechanisms	Length of contracts	5
	Tender timing relative to biosimilar availability	3
	Time from tender award to delivery	3
	Number of winners	5
	Winner decision criteria beyond price	1



BIOSIMILAR SCORECARD: THE NETHERLANDS

POSITIVE POLICY ELEMENTS

1. In the Netherlands, there is high awareness among payers of the value of using biosimilars to stimulate competition.
2. Insurance companies are alert to adjusting DRGs following the introduction of biosimilars, which results in hospitals needing to find savings opportunities by using biosimilars.
3. Current market structure with local tenders supports multiple manufacturers competing on the market.

POLICY CHALLENGES

1. Contracting is highly fragmented, with over 50 agreements in place being commonplace.
2. Knowledge and experience development is fragmented as a result.

POTENTIAL POLICY SOLUTIONS

1. Reduce the number of contracts while maintaining multiple winners.
2. Introduce purchasing decision criteria beyond price.
3. Strengthen education and awareness programs aimed at patients to reduce barriers to acceptance and adoption of biosimilars.

Netherlands 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

This scorecard and its content was produced by the IQVIA Institute for Human Data Science with funding from Medicines for Europe. 