Navigating Divergence

Accommodating the multitude of new payer bodies in emerging markets

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Background

- The traditional pharmaceutical market model focussed on large high-income countries is being challenged by the emergence of middle-income markets with rapidly growing economies, healthcare coverage, and willingness-to-pay for medicines
- To best-inform pharmaceutical reimbursement decision-making, many emerging markets are establishing Health Technology Assessment (HTA) bodies with varying evidentiary requirements and decision-making criteria
- This research systematically evaluates HTA appraisals in two Central and Eastern European countries:
  - Bulgaria; HTA body: National Centre for Public Health and Analyses (NCPHA), established 2015
  - Croatia; HTA body: Agency for Quality and Accreditation in Health Care and Social Welfare (AAZ), established 2009

Methods

- All publicly-available HTA assessments issued by NCPHA and AAZ (01/01/2010-31/12/2018) were screened and key information extracted

Results

Bulgarian HTA NCPHA

Croatian HTA AAZ

HTA appraisal numbers

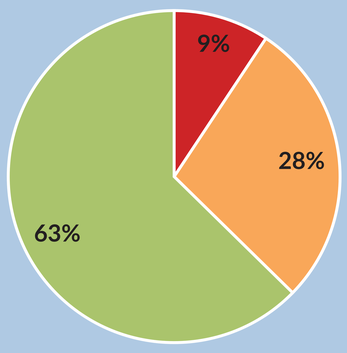
Bulgarian HTA appraisals by the NCPHA

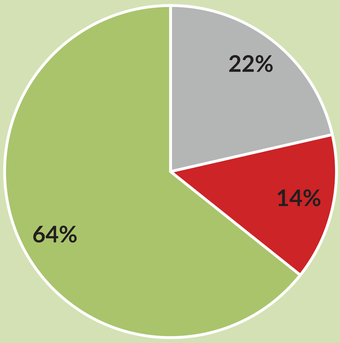
75 HTA appraisals conducted
(21 in 2016, 34 in 2017, and 20 in 2018)

Croatian HTA appraisals by the AAZ

14 HTA appraisals conducted
(2 in 2012, 4 in 2015, 1 in 2017, and 7 in 2018)

HTA appraisal outcomes





Many reports state that an incremental cost-effectiveness ratio (ICER) of 37,000BGN ($21,700USD)/QALY applies

Conclusions

- This research illustrates how two emerging markets from the same region with similar GDP per capita, can have very different HTA systems in terms of implementation, requirements, and decision-making criteria
- Grouping markets into discrete archetypes based on common criteria can better enable companies to appropriately and efficiently develop strategic decision-making, evidence generation, and communication plans that can be inclusive of the needs of emerging markets
- However, these need to be regularly revisited given the rapidly evolving landscape: e.g. in 2019 HTA responsibilities in Bulgaria will be transferred to another organization, NSCRLP

AAZ: Agency for Quality and Accreditation in Health Care and Social Welfare; GDP: gross domestic product; HTA: health technology assessment; ICER: incremental cost-effectiveness ratio; NCPHA: National center of public health and analyses; NSCRLP: National council for prices and reimbursement of medicinal products; QALY: quality-adjusted life year

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