

INTRODUCTION

- Payers use tenders to increase competition between manufacturers, as well as to ensure reliability and transparency in the buying process.
- For biosimilars, payers typically use tendering to identify the most economically advantageous products, using award criteria that may differ from the lowest price.

OBJECTIVES

- This research aimed to understand the trends in biosimilar tender award criteria in addition to price, and to identify opportunities for product differentiation.

METHODS

- Tenders Electronic Daily¹ archive, which allows access to public tenders published by the EU institutions, was reviewed for twelve biosimilars approved in the EU since 2017 (adalimumab, bevacizumab, etanercept, infliximab, insulin [aspart, glargine and lispro], ranibizumab, rituximab, teriparatide, trastuzumab and pegfilgrastim).
- Contract notices published in five countries (Belgium, Denmark, Italy, France and Spain) from January 2020 to May 2022 were analysed to collect award criteria. All award criteria were extracted by product and country.

RESULTS

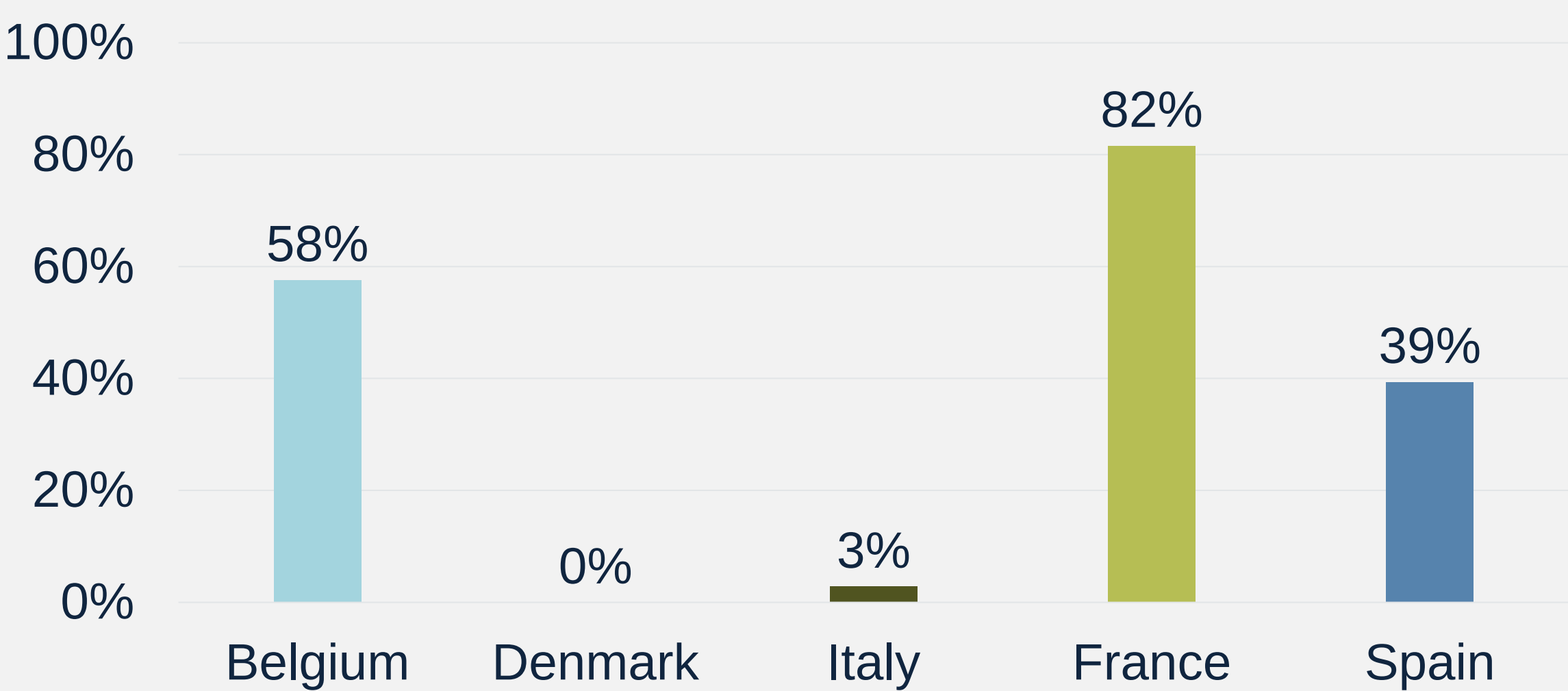
Table 1. Identified tenders for selected products

INN	All identified tenders (n)	Tenders with announced award criteria (n)	Tenders with price of >70% weight (n, %)
Trastuzumab	136	93	54 (40%)
Bevacizumab	132	89	51 (39%)
Rituximab	129	84	48 (37%)
Infliximab	93	70	36 (39%)
Insulin	52	42	19 (37%)
Pegfilgrastim	51	41	24 (47%)
Adalimumab	50	40	33 (66%)
Etanercept	39	31	21 (54%)
Ranibizumab	33	32	28 (85%)
Teriparatide	23	17	14 (61%)
Total	738	539	328 (44%)

*From all identified tenders with the keyword 'insulin' (n=341), only tenders for insulin aspart, glargine, and lispro were selected for further analysis

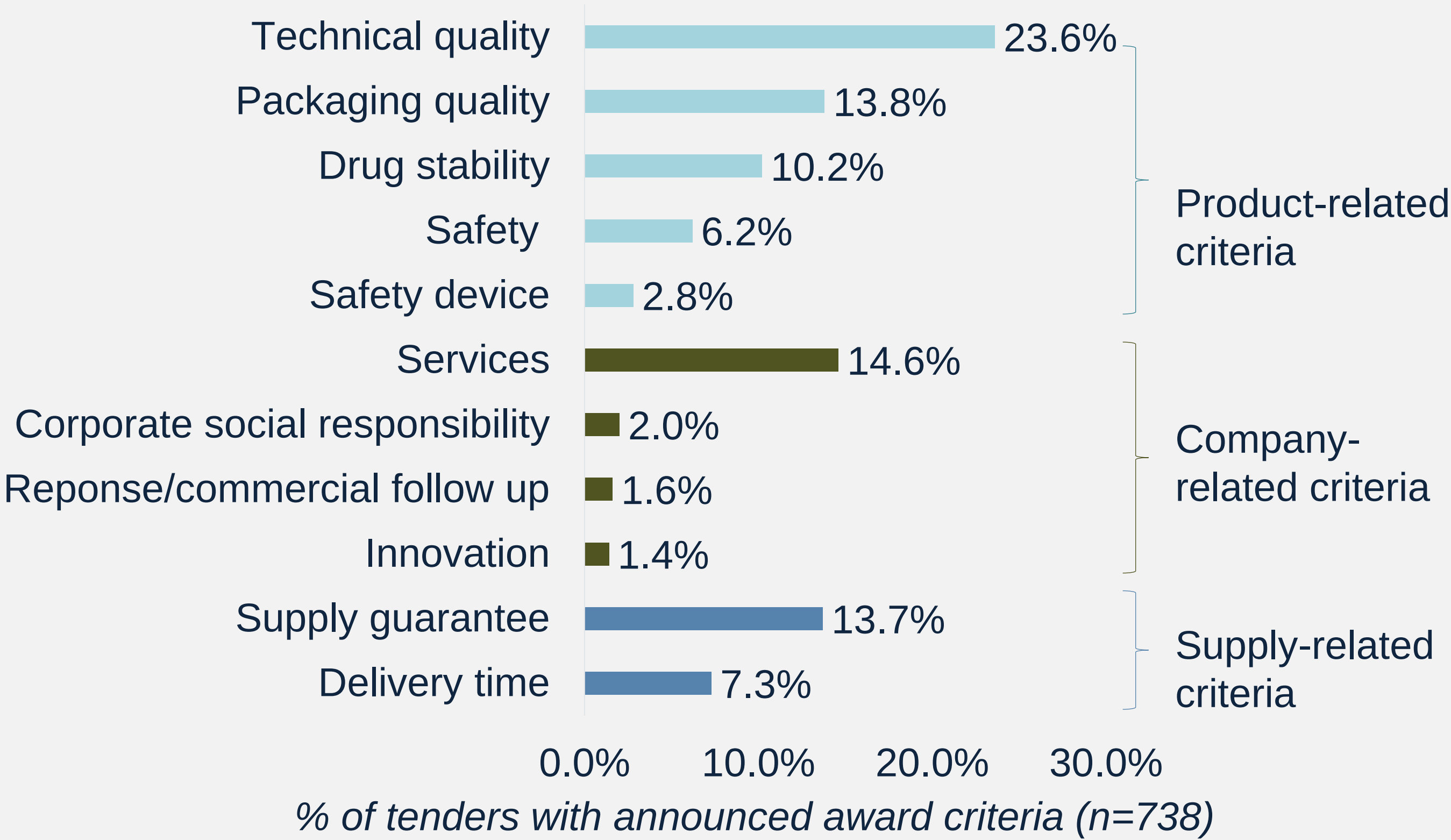
- The initial search yielded a total of 738 tenders, of which 542 with visible award criteria were included for further analysis.
- Most tenders with visible award criteria were for trastuzumab (n=93), bevacizumab (n=89), and rituximab (n=84) [Table 1].
- Price was weighted as 70% or above of the award criteria in 328 tenders (44%). Consequently, products for which price was the most relevant criteria (of >70% weight) in identified tenders included ranibizumab (n=28 [85%]), adalimumab (n=33 [66%]), and teriparatide (n=14 [61%]). Price was a less relevant criteria for bevacizumab (n=51 [n=39%]), infliximab (n=36 [39%]), rituximab (n=48 [37%]), and insulins (n=19 [n=37%]) [Table 1].
- Most tenders with visible award criteria were identified for Spain (n=213), followed by Belgium (n=148), Italy (n=109), France (n=49), and Denmark (n=20). Of those, price was the most relevant criteria (of ≥70% weight) for Denmark (n=20, [100%]) and Italy (n=3 [97%]), and less relevant for Spain (n=129 [61%]), Belgium (n=64 [42%]), and France (n=9 [18%]). The importance of criteria other than price was the highest in France (82%), and the lowest in Denmark (0%) [Figure 1].

Figure 1. Tendere with criteria other than price in selected countries*



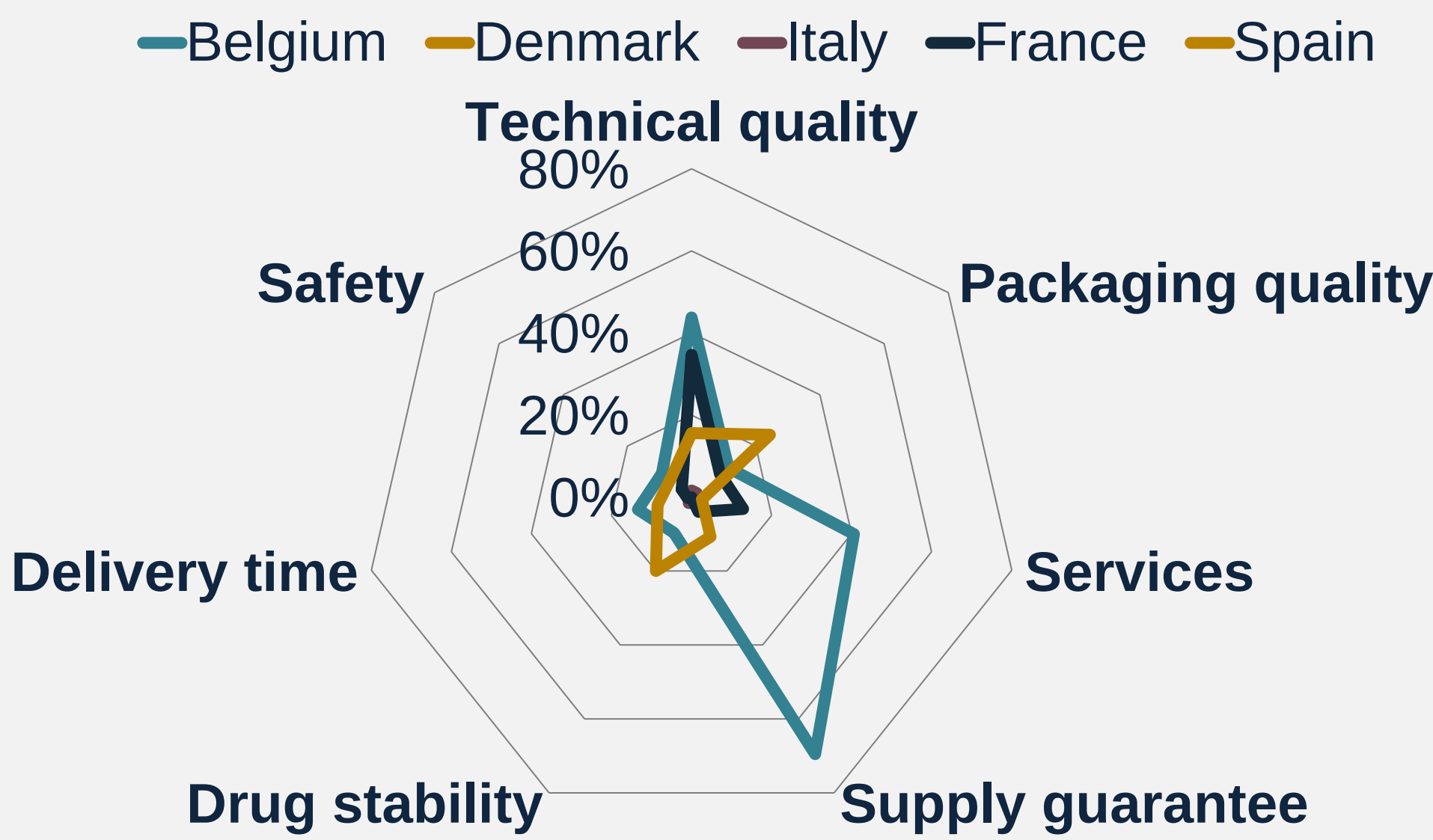
*Price was of weight <70% in identified tenders

Figure 2. Identified criteria other than price in tenders



- Subsequently, identified criteria other than price were divided into three categories: product-related (technical product quality, safety, drug stability, packaging quality or safety device), company-related (response and/or commercial follow up, corporate social responsibility, services, innovation), supply-related (supply guarantee, delivery time) [Figure 2].
- Most tender criteria other than price focused on the technical quality (24%), services (15%), packaging quality (14%), and supply guarantee (14%), drug stability (10%), delivery time (7%), and safety (6%) [Figure 2].
- Technical quality was present in 44% of Belgian tenders, 35% of French tenders, 16% of Spanish tenders, and 2% of Italian tenders. No tenders with technical quality as a criterion were identified for Denmark.
- Services as a criterion were used mostly in Belgium (41%), followed by France (13%), and Spain (3%). No tenders with services as a criterion were identified for Italy and Denmark. Packaging quality was present in 25% of Spanish tenders, 12% of Belgian tenders, 9% of French tenders, and 2% of Italian tenders. Packaging quality was not used in any of Danish tenders. Supply guarantee was used mostly in Belgium (31%), followed by Spain (11%), France (4%), and Italy (2%). No tenders with supply guarantee as a criterion were identified for Denmark. Drug stability was present in 20% of Spanish tenders, 10% of Belgian tenders, and 2% of Italian tenders. No tenders with drug stability as a criterion were identified for Denmark and France. Delivery time was used mostly in Belgium (13%), followed by Spain (9%), and France (1%), with no identified tenders for Denmark and Italy. Safety was used mostly in Belgium (9%), followed by Spain (7%), and France (3%). No tenders were identified for Denmark and Italy.

Figure 3. Mostly used criteria other than price in included countries



CONCLUSIONS

- The introduction of biosimilars gave payers the opportunity to focus on price as the principal procurement consideration on the assumption that originator molecules and their biosimilars do not differ in any meaningful manner. However, aside from the biological cell line differences, biosimilar products can be differentiated on other core characteristics and that payers in many markets are prepared to see value in them.
- In addition to price, the research identified several other criteria that manufacturers can potentially use to differentiate their products in the biosimilar area. This includes technical quality, services, packaging quality, supply guarantee, drug stability, delivery time, and safety, especially in markets such as Belgium, France and Spain.
- The results suggest that Denmark and Italy do not appear to use additional criteria other than price during tender evaluation for biosimilar products, however, this should not prevent manufacturers from continuing to explore how such alternative award criteria could be included in future, based on a clear value demonstration to key stakeholders.

REFERENCES

1. TED Tenders Electronic Daily. Available at <https://ted.europa.eu/TED/search/search.do> Accessed on 2022, 22 September.