Examining the awareness and perceptions of EU HTA amongst Irish pharmaceutical industry professionals

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Objectives

The Regulation (EU) 2021/2282 on health technology assessment (HTAR) entered into force in January 2022 and will be applied from January 2025. It aims to both ensure an efficient use of resources and to strengthen the quality of HTA across the European Union. Under the HTAR, Joint Clinical Assessment (JCA) and Joint Scientific Consultation (JSC) will begin in January 2025(1). National implications are not fully understood(2) as the adoption of the implementing acts, and methodological and procedural guidance are yet to be completed(3). This research intended to gauge the awareness and perceptions of HTAR in the Irish pharma industry. It also assessed preparedness at local and global level within organisations.

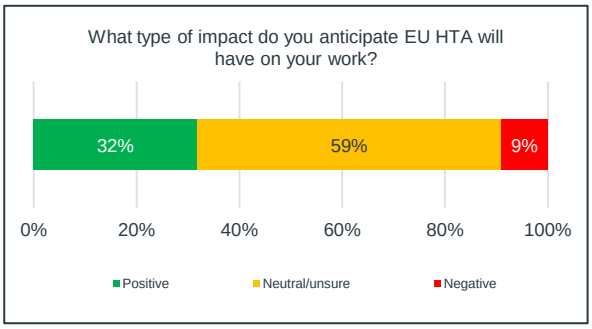
Methods

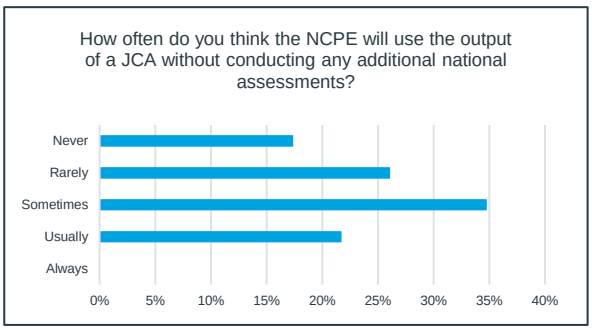
A survey was designed to explore the opinions on the HTAR across three domains – awareness, perceptions and preparedness. Irish-based industry professionals working in roles potentially impacted by HTAR were identified through a combination of local knowledge, company websites and LinkedIn searches. In June 2023, 37 Irish-based industry professionals were invited to complete the survey.

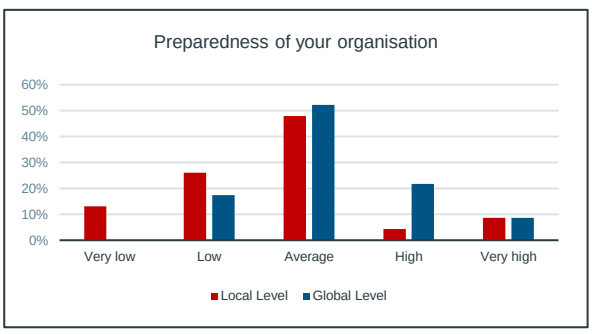
Results

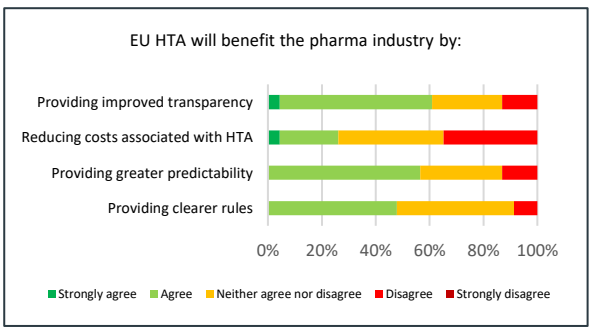
A total of 23 responses were received. Respondents were drawn from 13 different pharma companies. Eight of these companies were ranked top 10 (by revenue in 2022[4]), three were top 20 and the remaining two were top 30. Respondents were primarily from market access or HEMAR roles (74%) and included a broad range of experience levels, with 39% being in the first five years of their career, while 22% had over 20 years of experience.

- The majority of respondents (70%) felt that the HTAR would impact their daily work
- Familiarity with the topic of EU HTA was generally low. Approximately half (48%) described themselves as “somewhat familiar” with the topic, only 26% described themselves as being “very familiar”, while a quarter (26%) reported that they were unfamiliar or “had not considered” it
- The majority (59%) expressed uncertainty as to whether the HTAR would have a positive or negative impact on their work
- JSC was viewed positively, with the majority agreeing that it would help improve access for Irish patients (70%) and ensure the needs of Irish health technology assessors were considered (57%). Forty-three percent of respondents felt that the JCA would “rarely” or “never” be used by the National Centre for Pharmacoeconomics (NCPE) without conducting additional clinical analyses
- Irish affiliates appeared to feel that organisational preparedness was lower at local level compared to global level. Overall organisational preparedness was graded as “low” or “very low” at local level by 39% and at global level by 17% of respondents.
- Respondents generally agreed that EU HTA has the potential to benefit industry in terms of providing improved transparency (61%), greater predictability (57%) and clearer rules (48%). However, respondents were less positive about the potential for EU HTA to reduce the costs of HTA. Only 26% agreed or strongly agreed that EU HTA would reduce costs, compared to 35% who disagreed.









Role description	Market access	HEOR	HEMAR	Medical affairs	Regulatory	Brand lead	Other
	35%	0%	39%	0%	0%	4%	22%
Years of experience	**1-5 years**	**6-10 years**	**11-15 years**	**16-20 years**	**20+ years**		
	39%	26%	4%	9%	22%		

Abbreviations: HEMAR: health economics and market access, HEOR: health economics and outcomes research

Limitations

This survey focused on a rapidly evolving area. Interpretation of the results should include consideration for the timeframe when responses were collected. The small sample size limits the generalisability of results to the wider pharma industry in Ireland.

Conclusions

Irish pharma industry professionals expect the HTAR to have implications on their day-to-day activities. Overall, there is a feeling of cautious optimism as respondents agreed with many of the potential benefits of HTAR. However, significant uncertainty remains as there is a need to better understand how JCA will be included in NCPE assessments. Organisational preparedness, particularly at local level, could be improved.

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