IQVIA INSTITUTE FOR HUMAN DATA SCIENCE

BIOSIMILAR SCORECARD 2020
NORWAY

CONTRIBUTION OF BIOSIMILARS

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

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	3
	Physician switching policies	5
	No biologic pharmacy substitution	5
Awareness and education	Comprehensive training /education for patient	5
	Comprehensive training /education for physician	5
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	1
Purchasing mechanisms	Length of contracts	5
	Tender timing relative to biosimilar availability	5
	Time from tender award to delivery	5
	Number of winners	2
	Winner decision criteria beyond price	1

BIOSIMILAR SCORECARD: NORWAY

POSITIVE POLICY ELEMENTS

1. Norway achieved widespread acceptance by payers, providers and patients of biosimilars as an integral part of medicine use through an extensive program of preparing stakeholders, investing in evidence generation (e.g. NorSwitch trial) and introducing incentive models that share payer savings with hospitals.
2. Biosimilars are introduced very rapidly and competitive market dynamics between biosimilar manufacturers and originator manufacturer are quickly achieved.
3. Manufacturers winning a tender are assured of their product gaining the expected market volume.
4. Norway recently introduced changes to the tender framework allowing for two winners, if certain pricing criteria are met.

POLICY CHALLENGES

1. Despite the positive evolution, most tenders are awarded to a single manufacturer due to the strict pricing criteria. This may reduce the attractiveness of the Norway market and therefore result in fewer competitors over time.
2. Incentives for biosimilar use in retail settings are not fully developed or implemented.
3. Confidential agreement terms including tender prices are not always kept confidential, resulting in less trust by participants in the tendering process.

POTENTIAL POLICY SOLUTIONS

1. Removing or easing pricing criteria and consistently awarding multiple tender winners can result in more manufacturers being willing to bid and therefore intensifying the level of competition and long-term sustainability.
2. When sharing Norway's biosimilars experience with other health systems, sharing the full set of activities and investments made by Norway will help other countries understand both strategic and operational dimensions.
3. Continue having a multistakeholder approach in future policy discussions and implementations.

Norway 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 the Biosimilar Medicines Group, a sector group of Medicines for Europe.

IQVIA INSTITUTE FOR HUMAN DATA SCIENCE

CONTACT US
info@iqviainstitute.org
iqviainstitute.org