

# BIOSIMILAR SCORECARD 2020 FRANCE

## CONTRIBUTION OF BIOSIMILARS

| MOLECULE         | <br>LEVEL OF COMPETITION<br>1=Low, 5=High   | <br>PRICE EVOLUTION<br>1=Low, 5=High  | <br>VOLUME DEVELOPMENT<br>1=Low, 5=High   |
|------------------|---|---|---|
|                  | 1=Low, 5=High   | 1=Low, 5=High   | 1=Low, 5=High   |
| Anti-TNF         |   |   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  |
| Adalimumab       | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 4  |
| Infliximab       | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
| Etanercept       | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> 4            | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3                       | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1  |
| Insulin Lispro   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> N/A  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> N/A  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> N/A  |
| Insulin Glargine | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1  | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 2                                  | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 2                                  |
| Rituximab        | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> 4            | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 2                                  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1  |
| Trastuzumab      | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> 4            | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 2                                  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1  |
|                  | <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   |
| <br>Regulatory environment and clinical guidelines | Time from EMA approval to first biosimilars sales   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 4  |
|  | Treatment guidelines for biosimilar use   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  |
|  | Physician switching policies  | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
|  | No biologic pharmacy substitution   | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
| <br>Awareness and education                        | Comprehensive training /education for patient   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  |
|  | Comprehensive training /education for physician   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  |
| <br>Incentives                                     | Patient incentives to promote biosimilar use  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  |
|  | Prescription quotas or financial incentives for providers that do not restrict physician choice | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 4  |
| <br>Pricing rules and dynamics                     | Originator price not subject to mandatory price cuts  | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
|  | Molecule pricing not subject to reference price   | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
| <br>Purchasing mechanisms                          | Length of contracts   | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
|  | Tender timing relative to biosimilar availability   | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
|  | Time from tender award to delivery  | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 5 |
|  | Number of winners   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  |
|  | Winner decision criteria beyond price   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3  |



## BIOSIMILAR SCORECARD: FRANCE

### POSITIVE POLICY ELEMENTS

1. A government initiative is in place in France to increase biosimilar penetration to 80% of patients by 2022.
2. Patient associations actively influence the government and are involved in policy making in the biosimilar market.
3. In the hospital setting, incentives are in place for physicians to consider prescribing hospital/retail biosimilars.

### POLICY CHALLENGES

1. There are no incentives in place to encourage specialist physicians to initiate treatment with biosimilars or switch existing patients to biosimilars.
2. There is limited physician, nurse and pharmacist training around the patient self-administration of biosimilars and use of devices.
3. There is usually a single winner per tender which does not encourage healthy competition and can contribute to supply issues.

### POTENTIAL POLICY SOLUTIONS

1. Consider investing in training physicians, nurses, pharmacists and patient associations to support patients in administering biosimilars.
2. Consider the introduction of incentives promoting biosimilar use in a positive way that would contribute to biosimilar sustainability, both in hospital and retail prescription settings.
3. A pilot program that applies positive policies to encourage the appropriate use of biosimilars in hospital settings by sharing savings with the hospital.
4. Award multiple tender winners rather than a single winner resulting in healthier competition and better supply resilience.

France 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.iqvainstitute.org/biosimilarscorecards](http://www.iqvainstitute.org/biosimilarscorecards)

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