



Innovation Forum Greece

# Key Access Challenges in the Greek Healthcare System

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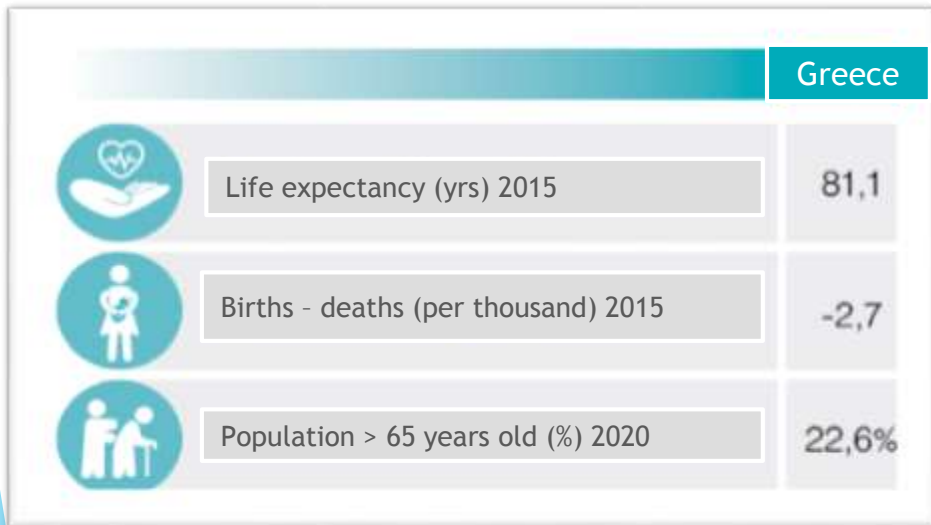
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# Key Healthcare Challenges

## The Needs are increasing...

### Demographic factors

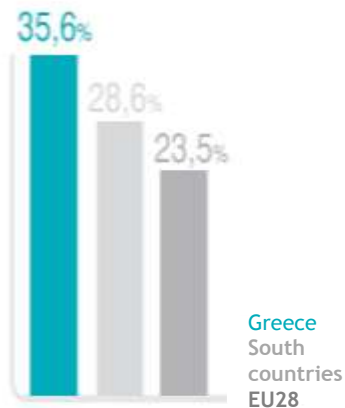
Higher life expectancy vs. lower birth rate and higher rate of older population in need for health treatment



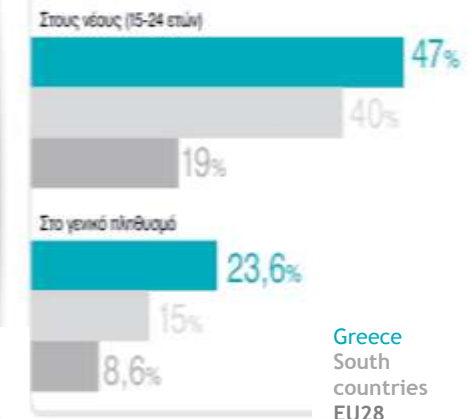
### Social factors

Higher rate of unemployment, “brain drain”, lower income

Poverty Indicator (%) 2016



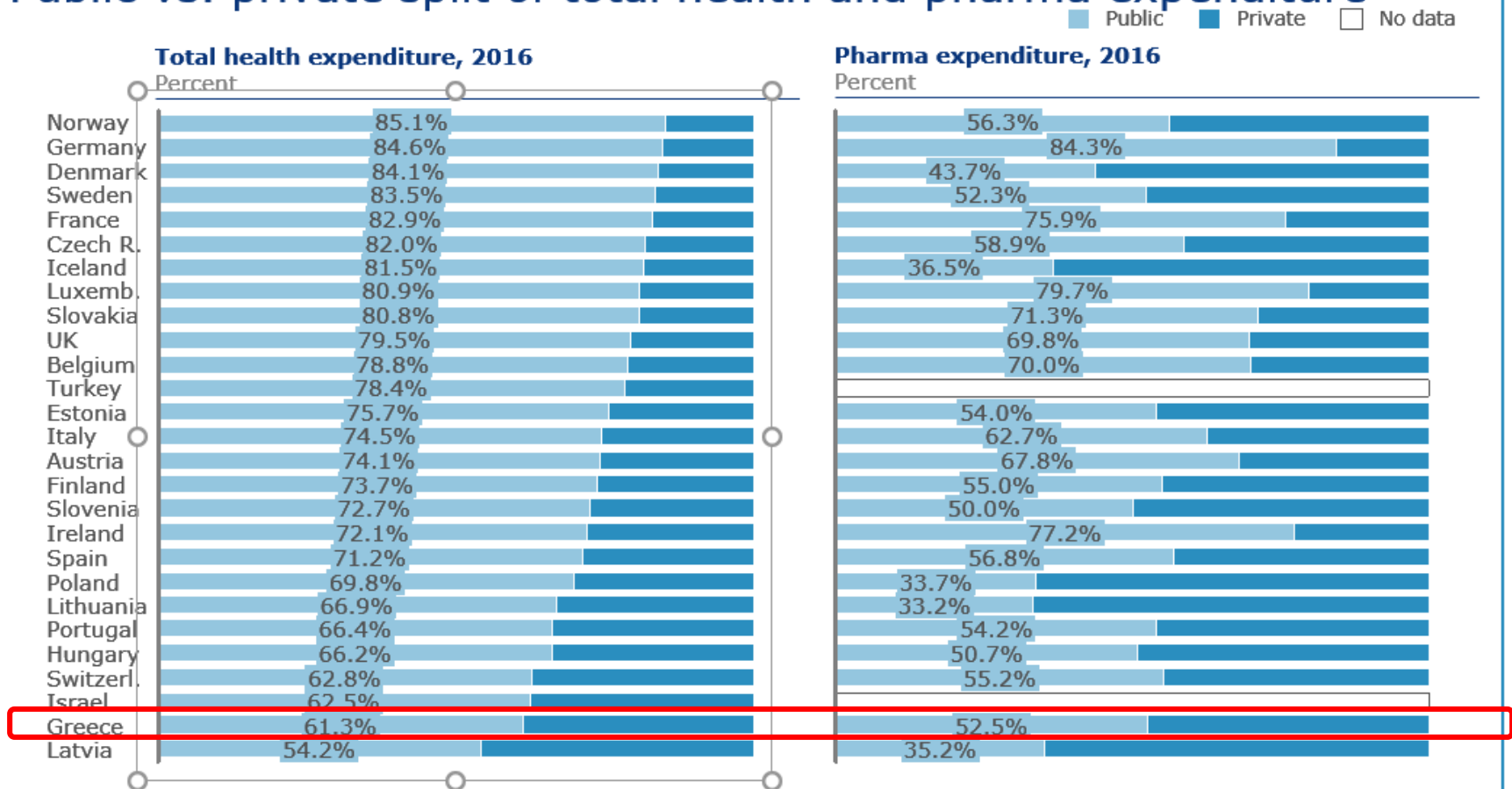
Unemployment Indicator (%) 2016



# Key Healthcare Challenges

## Insufficient Public Expenditure

### Public vs. private split of total health and pharma expenditure

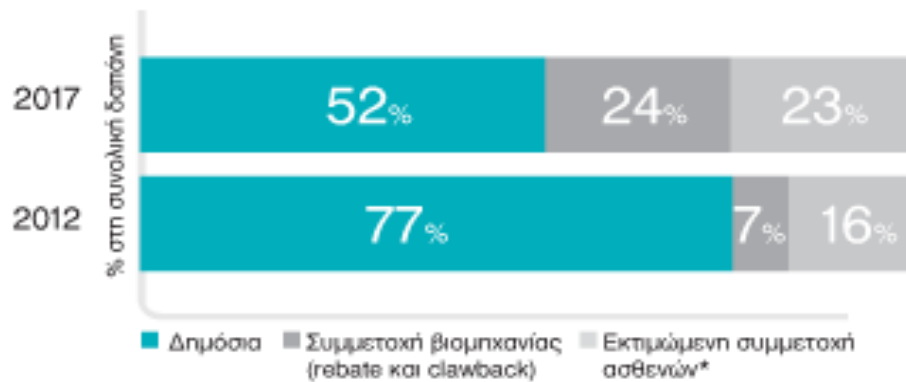


#### Definition and relevance

- Public expenditure includes government and social security funds' expenditures
- Private expenditure includes out-of-pocket spend as well as spending on private health insurances
- The split provides insights on the set-up and focus of the individual healthcare systems, e.g., the Danish system is primarily publically financed; however, private payors play an important role in the pharmaceutical space

# Pharmaceuticals: The burden for Patients & Industry

**Patients & Industry pay  
1 to 2 medicines**



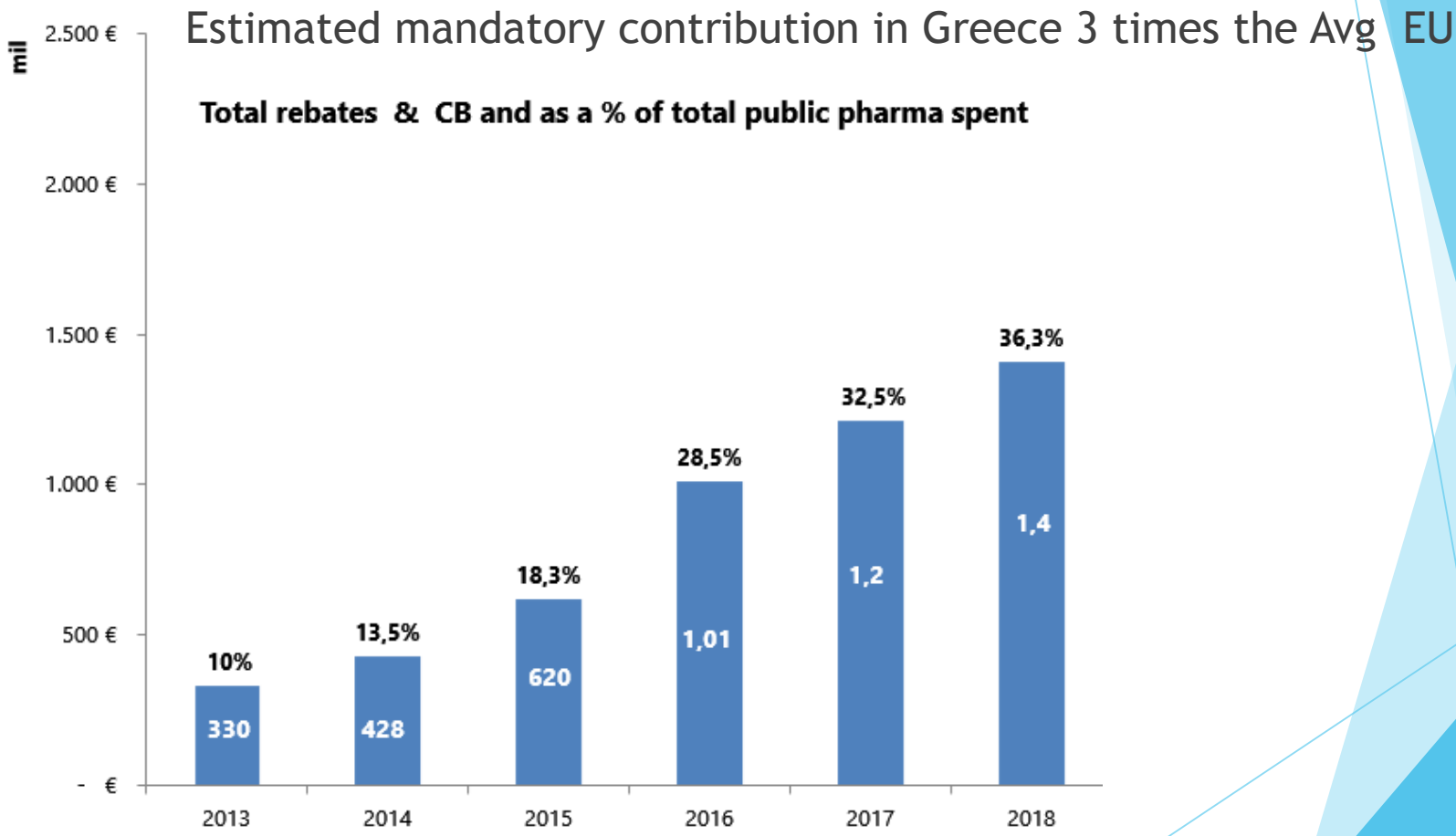
Participation in **Outpatient**  
Pharmaceutical Expenditure

**The Industry pay  
1 to 3 medicines**



Participation in **Hospital**  
Pharmaceutical Expenditure

# Clawback & rebates have an impact on providers long term sustainability and may promote complacency



Source: SfEE (2018)

# Tackling healthcare system inefficiencies is important to ensure more patients have access to treatment and care

## Cost estimations of inefficiencies within healthcare systems



In England alone,  
**£5 billion**  
**per year**  
are lost in **inefficient practices** due to **variations in hospital care costs**  
This amount corresponds to **9% of the annual hospital spending**



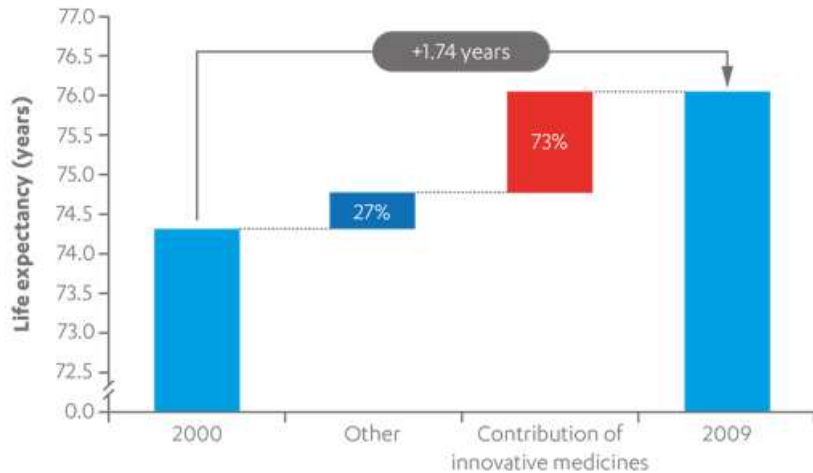
**€125 billion**  
**per year**  
are lost due to **poor adherence** in Europe



**€1.1 billion**  
**per year**  
is lost due to **poor communication** between **doctors** and **patients** in England

# The Value of Innovation

Innovative medicines make the world a better and healthier place: they contributed approximately 73% of the improvement in life expectancy observed from 2000-2009<sup>1</sup>



Innovative new therapies have enabled patients to Continue contributing to society



## Cancer

The overall rate of returning to work following a cancer diagnosis has **grown to over 75%** due to innovative therapies<sup>2</sup>



In France, **82.1% of working women diagnosed with breast cancer returned to work** after a median sick leave of 10.8 months<sup>4</sup>



In the Netherlands, **83% of working individuals diagnosed with head and neck cancer returned to work**, and most often within 6 months after treatment<sup>5</sup>



In Japan, **81% of patients diagnosed with cancer returned to work** within 12 months of their initial sick leave<sup>3</sup>

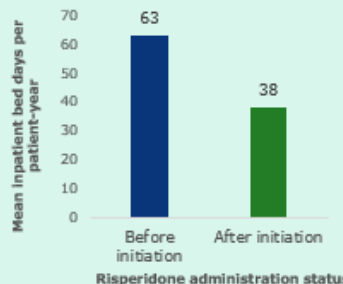
## Medicines benefit patients' lives by reducing hospitalisation rates



A French study showed that new drugs introduced during 1995-2004 reduced the number of hospital days in 2009 by **~11%**<sup>6</sup>

A **25%** reduction in hospitalisation rates was observed in HIV patients treated with boosted protease inhibitors between 2005 and 2011<sup>7</sup>

Long-acting risperidone injections for patients with schizophrenia reduced the mean annual number of bed-days by **40-45%**<sup>8,9</sup>



**P/RMA**

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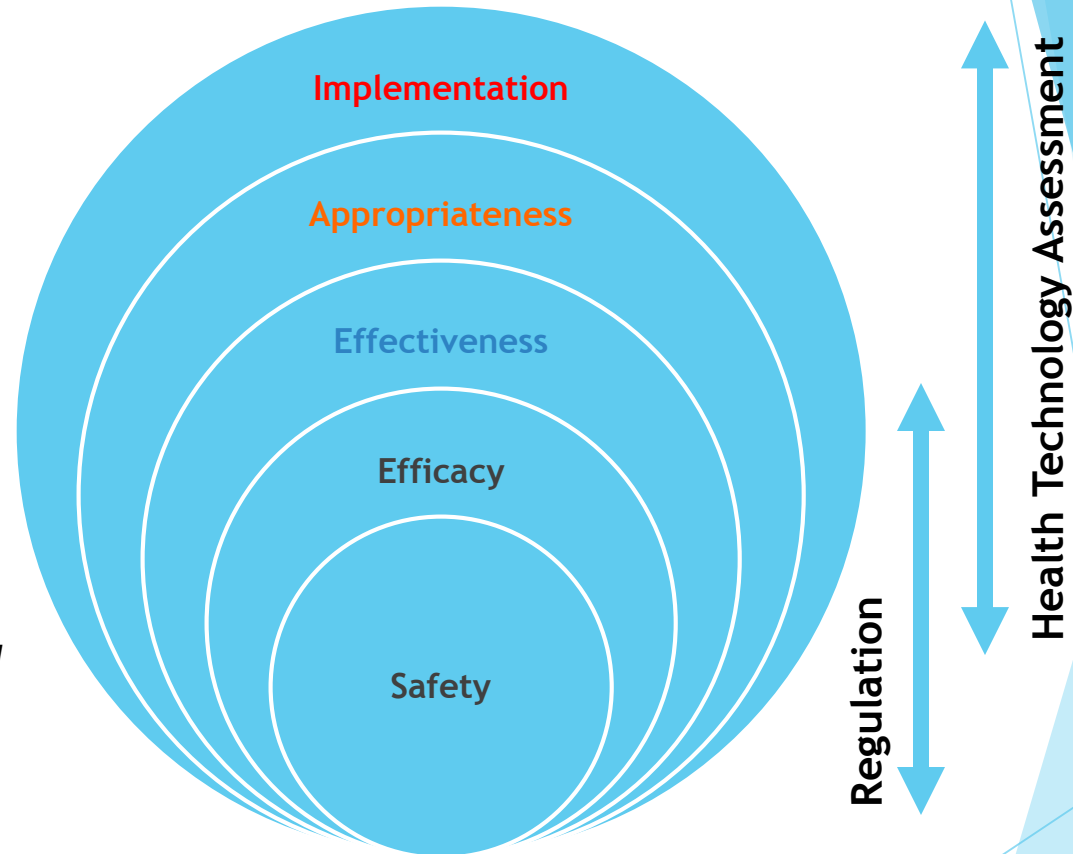
# HTA: A tool for evidence-informed decision making in health

*How can we use it effectively?*

*Do we really need it?*

*Can it work in my country?*

*Is it safe & of good quality?*





# HTA in Greece: a welcome reform; still there are concerns



The “9-6-3” rule

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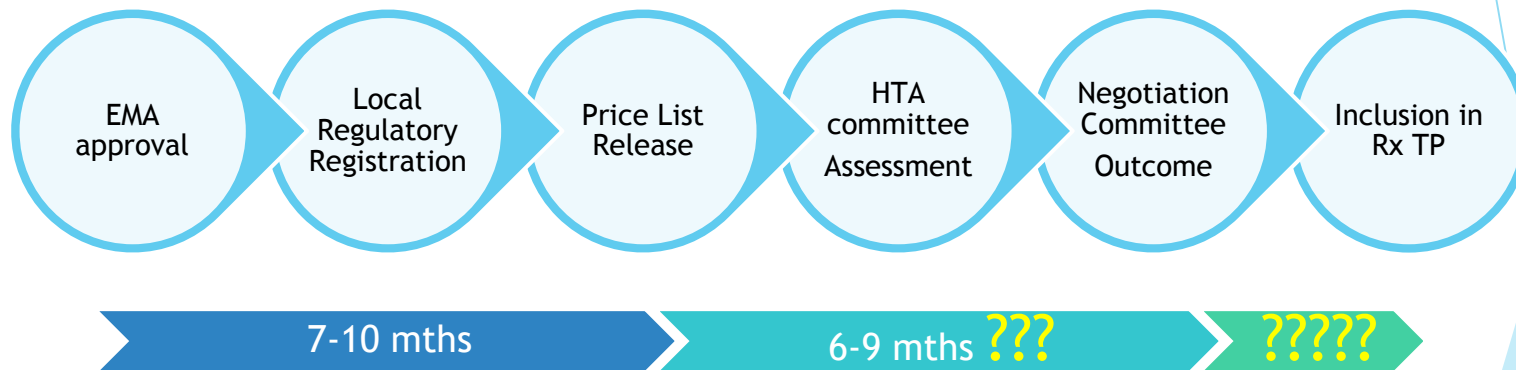
The 25% entry rebate for new medicines

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The automatic assessment & reimbursement  
of medicines & respective biomarkers tests

# Procedural delays and inefficiencies may create access challenges

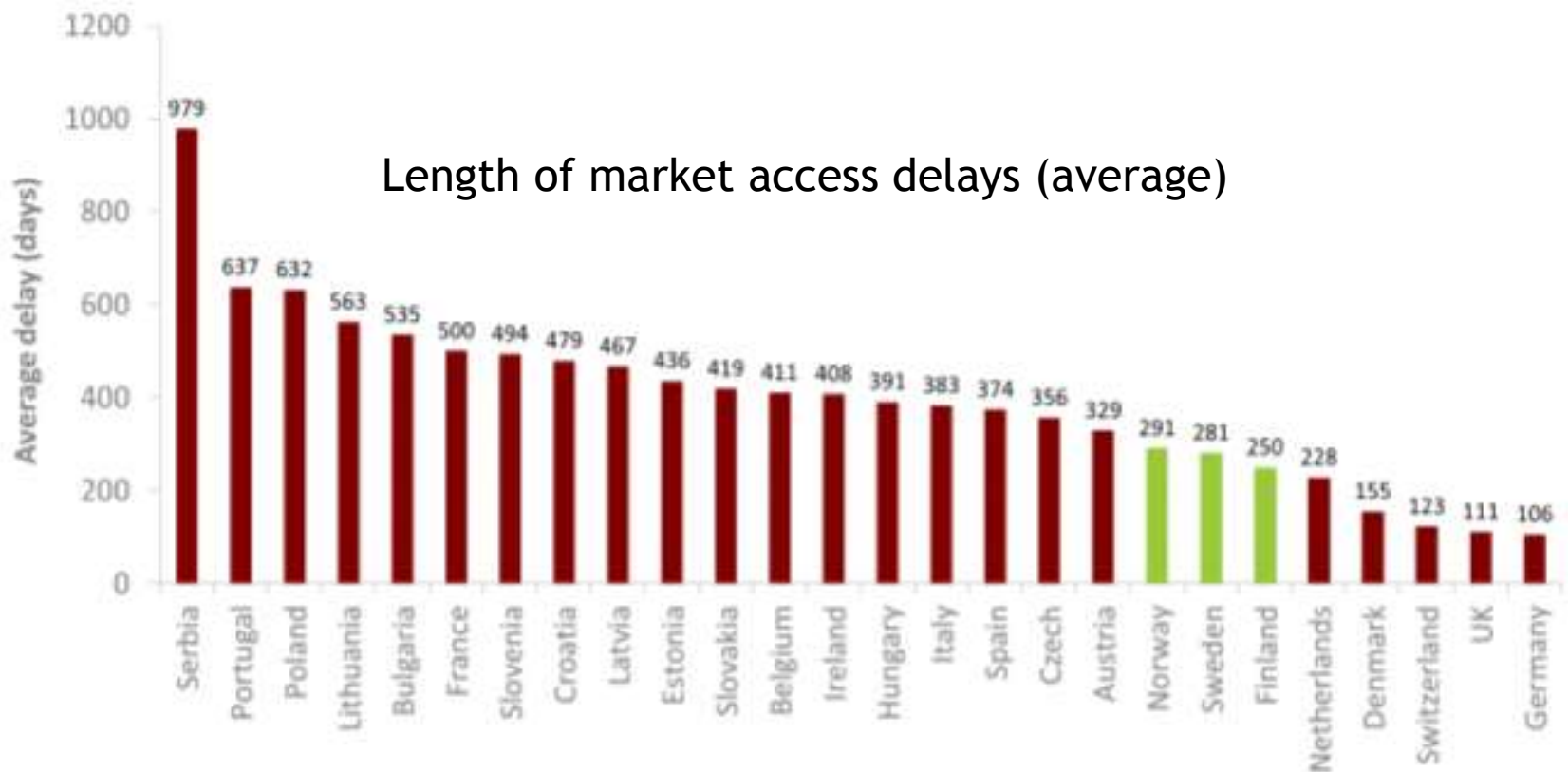


# The number of new active substances likely to be recommended for approval is expected to continue to rise in 2019

## Europe: Approval procedures (2018)

|  | 2017 | 2018 |
|--|------|------|
| Orphan medicine  | 19   | 21   |
| Accelerated assessment                                 | 7    | 4    |
| Conditional assessment                                 | 3    | 1    |
| Recommendation granted under exceptional circumstances | 2    | 3    |
| ATMPs  | 2    | 3    |
| Source: EMA (January 2019)                             | 33   | 32   |

# How will Greek patients' speed of access to innovation compare with other Europeans?



■ For most countries patient access equates to granting of access to the reimbursement list, except for hospital products in FI, NO, SE where some products are not covered by the general reimbursement scheme and so the zero-delay is artificially declining the median and average.

In France, some innovative products without competitors can be made available prior to market authorisation under the system of Temporary Authorisations. As these are not taken into account in the analysis, the average for France is higher than in reality.

# Pharma Innovation Forum Proposals

**Rationalize  
Public Pharma  
Expenditure**

Increase Public Pharma Expenditure

Decrease Claw Back

**Accelerate  
Structural  
Reforms**

HTA committee activation

Control consumption

Patients Registries

Patients Electronic File, Primary Health Care

*Thank you!*