

Mind the access gap: cost-effectiveness aspirations against scientific realities

Advancement of Treatments FOR RARE DISEASES

Science and innovation in rare diseases are moving faster than ever...

- **A strong medical need :**
 - More than 7,000 rare diseases, but **very limited treatment options** (~5%)
 - **Around 10–12%** of people living with a rare disease are in Europe
 - A **significant social and economic burden**: €249 billion per year in Europe
- **Unprecedented scientific progress, driven by precision medicine**
 - **Earlier diagnosis** through genomics
 - **Breakthrough innovations** such as gene therapies, new biomarkers
- **A growing commitment from biotech companies, despite a high-risk business model :**
 - **44% of clinical trials worldwide** focus on rare diseases
 - Orphan drugs have accounted for **more than 50% of new marketing authorizations** over the past five years and are expected to represent **20% of the global prescription drug market** by 2030

... Despite the specific challenges associated with rare diseases

- **Small patient populations**
 - *Complex clinical trial designs, need to rely on RWE and inability to meet HTA traditional requirements*
- **High heterogeneity and interindividual variability**
 - *Clinical results are difficult to interpret*
- **Uncertainty around endpoints**
 - *Due to less known MOA and no current treatments, endpoints are not always scientifically validated or fully recognized by HTA bodies (e.g., biomarkers, functional or motor scores)*
- **Lack of existing treatments**
 - *No established standard of care, difficulty in demonstrating the additional benefit brought by innovation and therefore in meaningfully calculating ICER/QALY*

Solutions to bridge the gap between science, HTA assessments, and patient access to innovative therapies

- **Adapting HTA evaluations**
 - *Valuing the wealth of RWE*
 - *Moving beyond a strictly ICER/QALY-based approach to integrate other dimensions of value (avoided costs, societal benefits, breakthrough innovation...)*
- **Developing specific RD expertise among evaluators**
 - *Developing dedicated training programs on specificities of Rare Diseases clinical development*
 - *Relying on dedicated RD evaluation committees with specialized clinicians / mobilizing expertise at the European level through ERNs*
- **Strengthening the voice of patients in assessments**
 - *Valuing quality of life data and the impact on families*
- **Turning the EU HTA reform to an opportunity**
 - *Harmonizing clinical/evaluation criteria across Europe*
 - *Reducing duplication with national assessments accelerating market access*

Fostering therapeutic innovation in Europe to ensure the momentum in rare diseases is sustained

- If rare diseases today account for a growing share of therapeutic innovation, **significant challenges remain for clinical value to be fully recognized**
- The ask is not to reduce evaluation requirements, **but to adapt them to the scientific realities of rare diseases so that innovation can truly reach patients**
- Recognizing the true value of this high-risk business model could provide an opportunity for **Europe to become a competitive worldwide player by prioritizing investment in rare diseases and adapting HTA assessments to ensure fast access to patients**
- **It is still time to act.** The growing attention given to rare diseases in Europe is a positive signal and a key lever to create a virtuous cycle and stimulate research and therapeutic innovation