

Horizon scanning – briefing for the Pan UK ATTC Pharmacy Working Group

What is Horizon Scanning?

Horizon scanning is the systematic process of identifying new medicines or technologies in development.

Why is horizon scanning important for the NHS?

It allows the NHS to:

- plan medicines budgets more effectively.
- implement new services, or re-design existing services.
- incorporate new medicines into treatment guidelines.
- train staff on how to prescribe or administer new medicines.
- begin to review trial evidence, to determine if it will be clinically and cost effective.

Ultimately, it helps manage the entry of a new medicine into the NHS.

What are the outputs from horizon scanning processes used for?

- NICE technology appraisal and other Health Technology Appraisal planning
- Budget planning at all levels from directorate level through to commissioned services level
- Specialised commissioning and Regional Medicines Optimisation Committee work planning
- Formulary committee/ Drug and therapeutics committee planning
- Secondary care directorate level or specialist service planning e.g mental health, respiratory
- Infrastructure planning/updates/changes (e.g. High cost drugs list (Tariff) development, service delivery model changes, new Dm&D coding)
- Updating resources that support delivery of patient care (e.g. SPS website)

Who provides horizon scanning expertise?

The following organisations provide horizon scanning expertise in the UK. Their remit differs according to their funding source and stakeholder requirements.

Organisation	Key Focus
Specialist Pharmacy Service	NHS customers at all levels
NIHR Innovation Observatory	NICE for HTA planning, academia
Scottish Medicines Consortium	Health Technology Appraisal (HTA) and budget planning in Scotland
All Wales Medicine Strategy group	HTA and budget planning in Wales

What resources are used in horizon scanning?

[UK PharmaScan](#) is a secure horizon scanning database populated by manufacturers with information on new medicines in their company pipeline. In addition, commercial horizon scanning databases, clinical trial registries, newsfeeds, licensing authority websites, industry websites and personal contacts are all used to provide additional data.

How are horizon scanning data used?

Staff with horizon scanning experience and knowledge of the therapeutic area, regulatory processes and infrastructure in which the new product/technology will be introduced, use these data to estimate the likelihood of the new product/technology launching in the UK, the anticipated date of availability and its potential impact on the NHS. This is presented in a variety of outputs targeted at customer and stakeholder needs.

Medicines development is a rapidly changing environment that requires constant review, update and re-evaluation, which means there are limitations to horizon scanning methodology that need to be understood. Data and predictions are only valid at any one point in time. The following factors impact on the actual availability of a medicine on the UK market:

- clinical trial results,
- regulatory discussions and decisions,
- company presence in the UK, mergers and acquisitions, commercial decisions,
- HTA outcomes,
- reimbursement negotiations,
- commissioning decisions including treatment pathway decisions.

Any of these factors could, at any point in time, alter the anticipated launch date and availability on the UK market of a new product, licence extension or new formulation.

Is horizon scanning for ATMPs different to that for conventional medicines?

The process of horizon scanning for all technologies is the same but there are differences that make horizon scanning for ATMPs more difficult.

Firstly, the field of ATMPs is an emerging and rapidly evolving science. Products move from phase II study through to NHS availability much faster than conventional medicines, especially if they can deliver a transformative or curative option. However, because of the complex nature of the products, there is also more likely to be a higher attrition rate in the number of ATMP products that actually reach the market. Evidence of effectiveness is also usually limited to small numbers of patients which poses a challenge for health technology appraisal processes.

Horizon scanning for ATMPs is arguably more critical for the NHS than for conventional medicines. As well as the high acquisition cost of these products which impacts on commissioning decisions, they also have significant and complex infrastructure delivery costs and mechanisms. From the perspective of patient identification, treatment and follow-up, existing NHS clinical systems and processes, including staff training, are currently not mature enough to deal with ATMPs. Beyond the individual patient level, healthcare services are not currently configured to commission and provide these therapies as routine treatment. These factors need to be understood and effectively managed prior to ATMP market availability.

Finally, the developers of ATMPs are largely smaller biotech companies, often working in collaboration with academia, neither of whom have the traditional infrastructure to engage with the NHS in advanced planning activities.

For these reasons, and because of the disruptive nature of ATMPs, it is important that those likely to reach the UK market are within the sight of commissioners, policy makers and providers as early as possible. The horizon scanning mechanisms to facilitate this are already in place, but a wider understanding of the need for, and importance of, horizon scanning by the developers of ATMPs is required.

What resources are available on ATMPs in the pipeline?

The latest SPS horizon scanning resources can be accessed at www.sps.nhs.uk/prescribing-outlook-2019/ (login required and only accessible to NHS staff). For the first time a document that focuses specifically on [ATMPs](#) is included. As this is an emerging field, please send comments on the value of this document and how it can be improved to helen.davis@liverpoolft.nhs.uk.

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