



# Evaluation and market access of high-value medicines in the Nordics

*The pharma industry's perspective*

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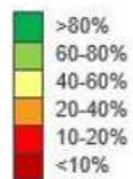
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**AMGEN**

# Setting the scene

## HTA system outcomes in Europe

- Wide variation in time to availability across Europe
- Delays are growing, especially in oncology
- <50% of 2020 onwards approved medicines available in Nordics
- Rare disease medicines consistently underperform



Availability across European countries (average % availability) for medicines approved 2020-2023

# Life-science is a national and EU level priority

A concerted effort for excellence,  
long-term competitiveness and  
increased patient benefit

National life sciences strategy  
New objectives



**Strategy for life  
science towards  
2030**

NOVEMBER 2024



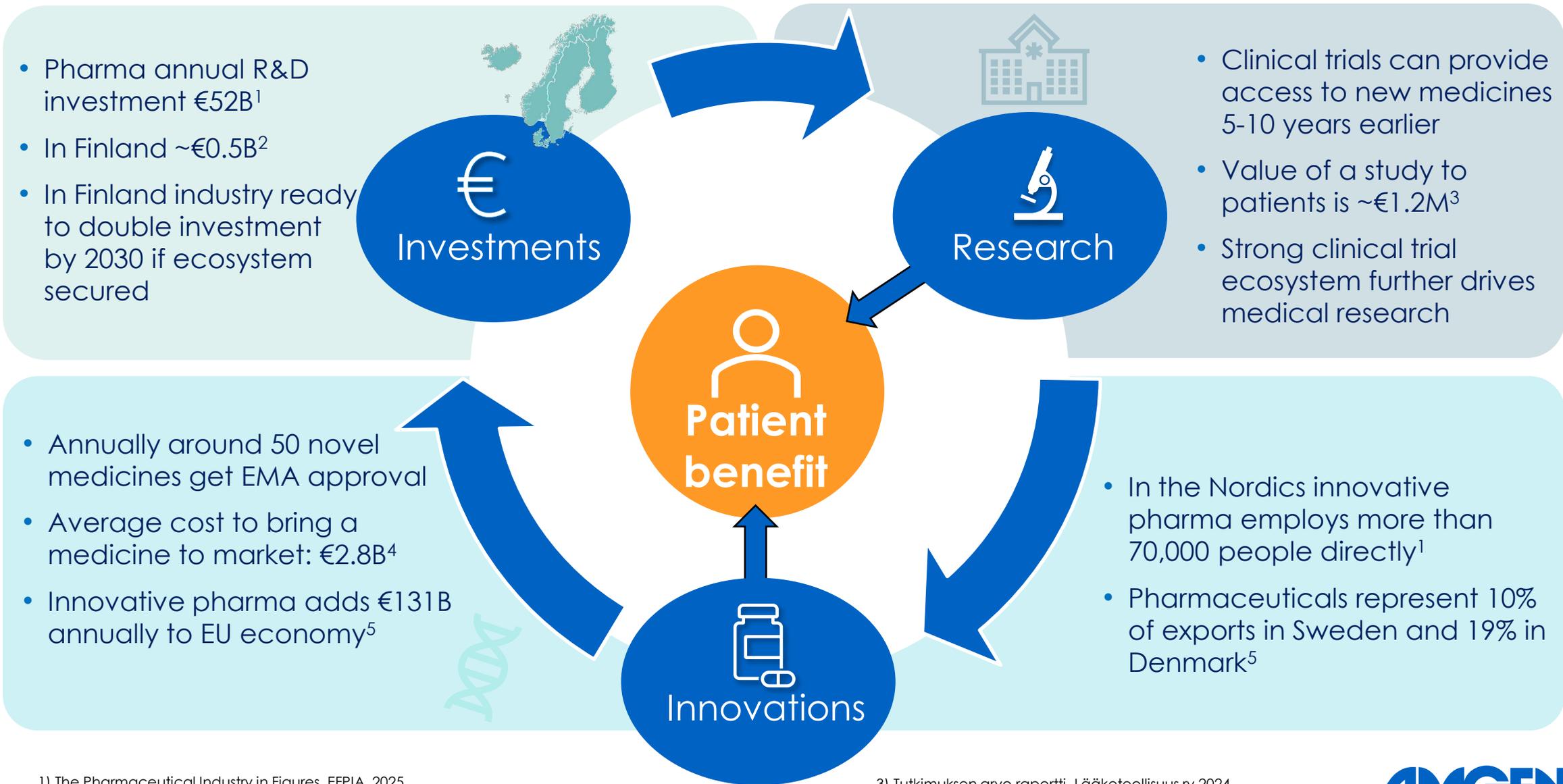
# Why Focus on Life Science?

- Growing global demand for innovative treatments
- Unique strengths in the Nordics: education, digitalization, (RW) data opportunities
- Life science fuels resilient economic growth
- Need to improve effectiveness of HC systems to treat increasing amount of patients
- Important element for the strategic autonomy



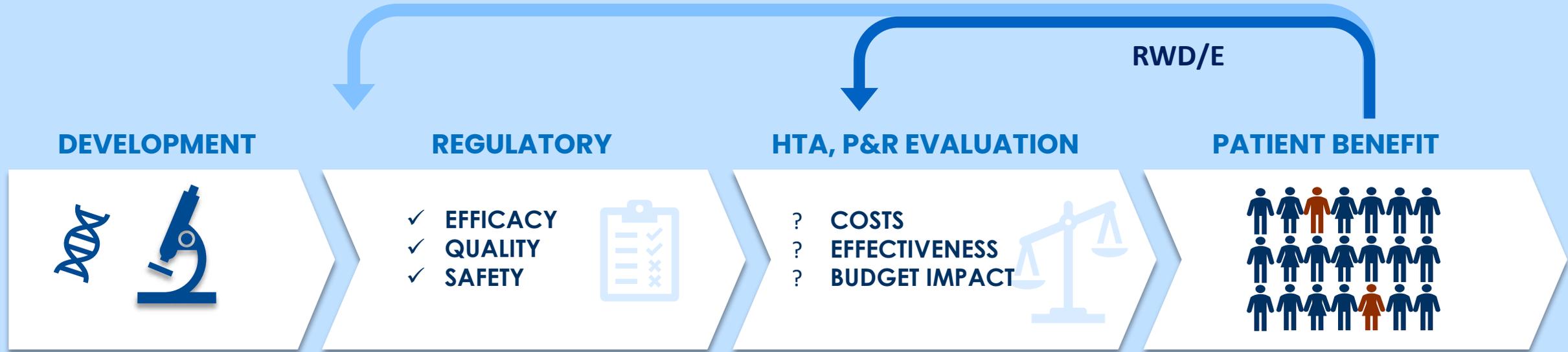
Gross domestic product (GDP) at current prices in the Nordic countries from 2011 to 2027, by country<sup>1</sup>

# Life-science ecosystem flows



# Sources of access delays

*Medicines must be available to accumulate evidence*



- Real-world comparator
- Unmet need

- Safety in broader populations
- Efficacy in subgroups not included in trials

- Real-world comparator
- Benefits in real-world use across subgroups
- Tolerability & adherence
- Direct & indirect costs
- Budget impact in routine care

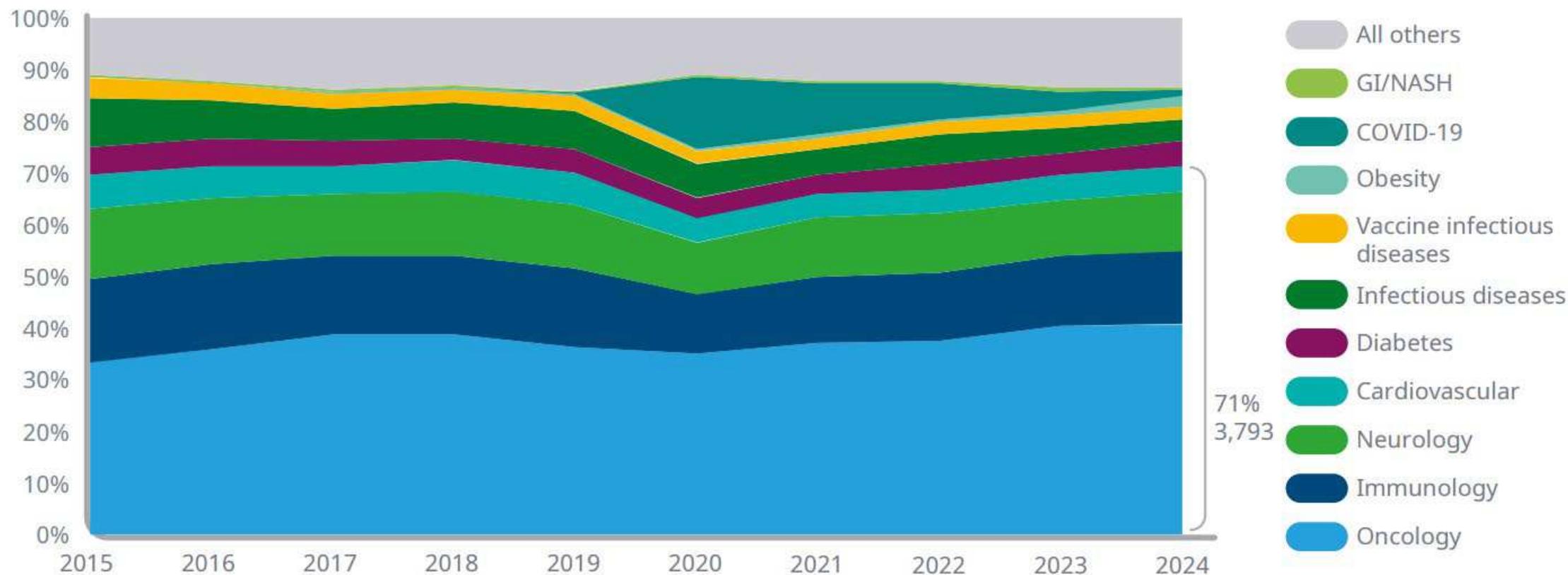
- Patient care pathway roadblocks
- Tolerability & adherence
- Duration and cost of treatment

# Drug development focus

## *What we need to be prepared for*

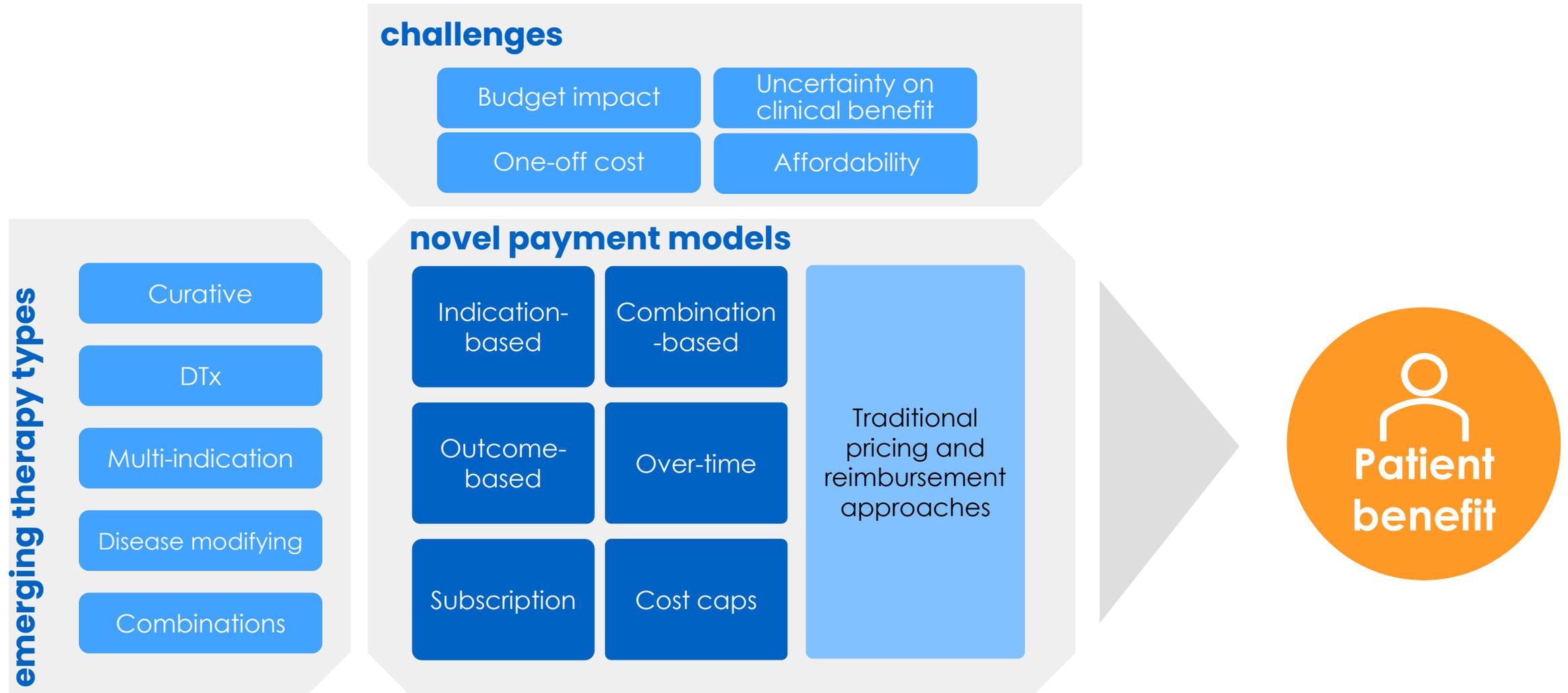
Clinical trial starts by therapeutic area, Phase I to III, 2015–2024

In 2024, 5,318 new studies were initiated, 41% of which were in oncology



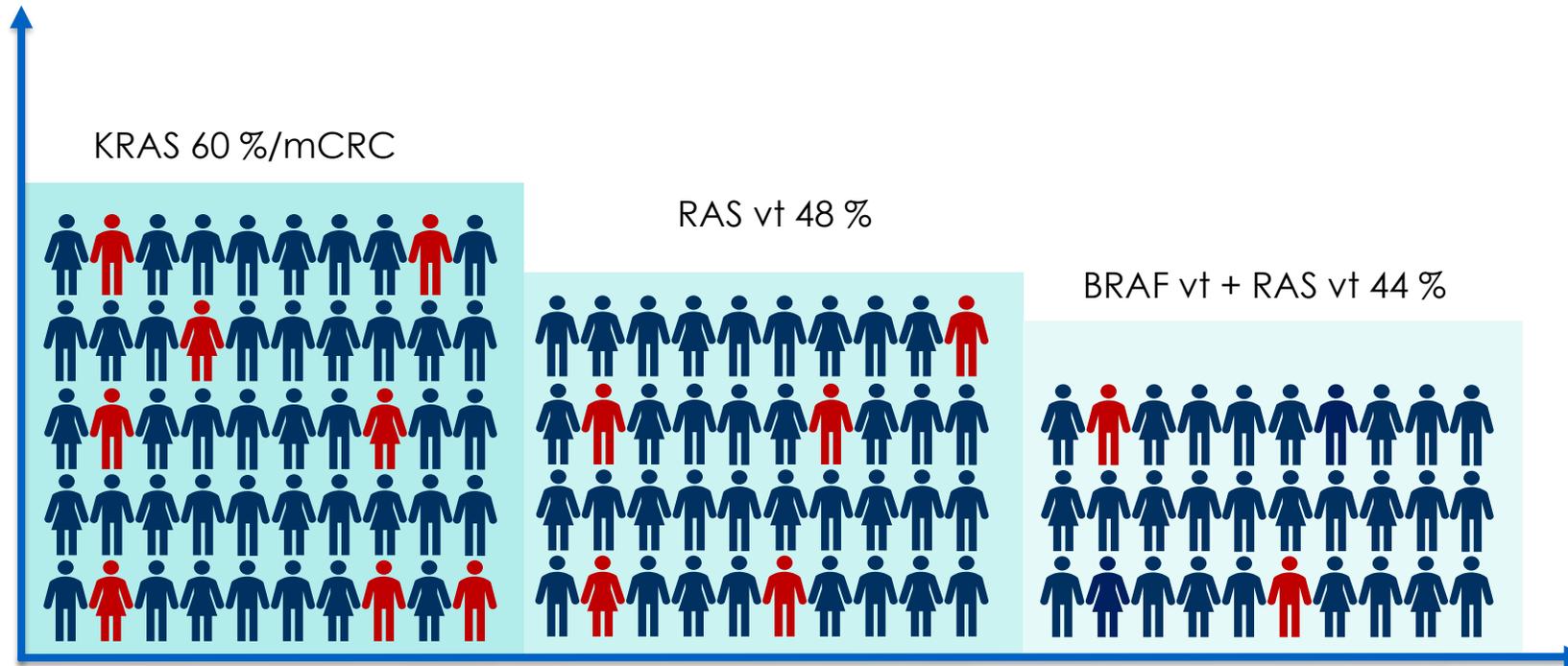
Reference: IQVIA: Global trends in R&D 2025.

# Novel approaches needed to address open questions



# Example: Insight from real-world drives effectiveness

## Targeted treatment for mCRC



Drug comes to market

### TOOLS USED

- Tumour diagnostics
- Better patient selection
- Long clinical study program
- Adverse event management
- Patient adherence support
- Continuous multi-professional training

# Conclusions

*Collaboration and continuous co-development is the key*

- **Timely access to new innovations** is essential to deliver better patient outcomes and attract further investment to drive economic growth.
- **New innovations must get access** so their real-world performance can be assessed, and usage and pricing guided by evidence.
- **Flexible market access models** enable the adoption of innovation without compromising budgets
- **The Nordics can become an innovation hub** for pharma, pioneering data-driven pricing and payment models.
- **Pan-Nordic collaboration** enhances scalability, sample size, and cost-efficiency, strengthening competitiveness.

# Real-time data is a basis for future



**Thank you!**