

**9th HTA
conference**

TUESDAY
23/04/24
DIVANI CARAVEL



The Healthcare system in Greece Strengths, Opportunities, Threats.

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Agenda

- Strengths of the HC system in Greece
- The issue of Austerities is growing
- Pharma expenditure and the GDP
- Key opportunities and threats of the HC system in Greece



**Development is
a gradual and
ongoing
process**



Milestones achieved by the HTA process in Greece-key wins and areas of improvement

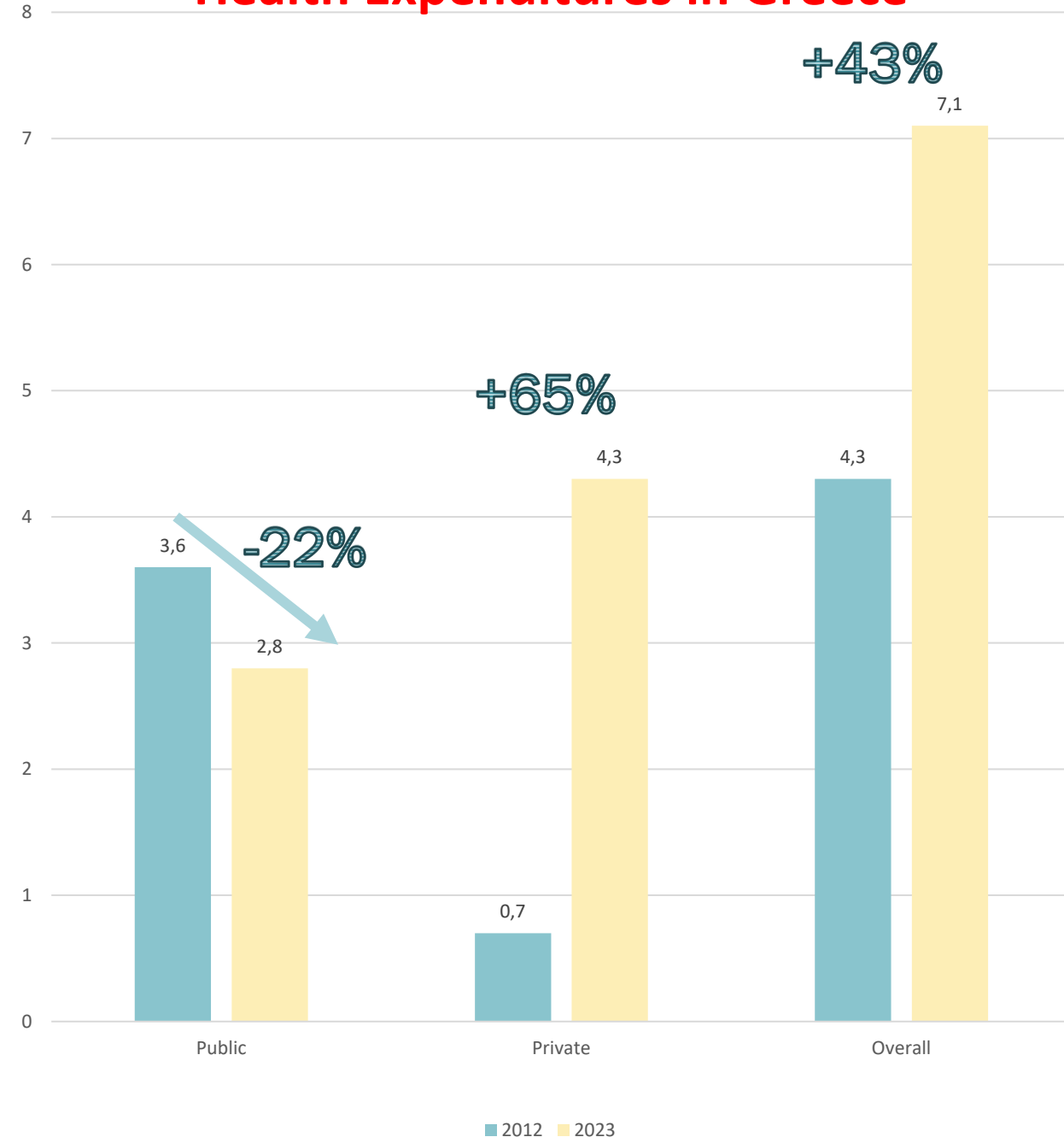
- HTA in Greece established **since 2019**, where assessments were lengthy taking several months each and with a severe **lag in assessments** → **2024** assessments **faster**, more **efficient** all lagging applications have been **cleared**
- **Horizon Scanning** has been an ongoing process established for 2 years so far, but improvements can be still made → Pre-approval stakeholder discussion
- EPAS → essential tool for patient access to innovative treatments
- **Data Generation has** been lacking in Greece → Separated efforts have been made by the private sector but the public health policy makers could “embrace” this initiative
- The potential for **risk sharing agreements** in the negotiation process are still untapped.



Overcoming adversity

Addressing the Elephant in the Room

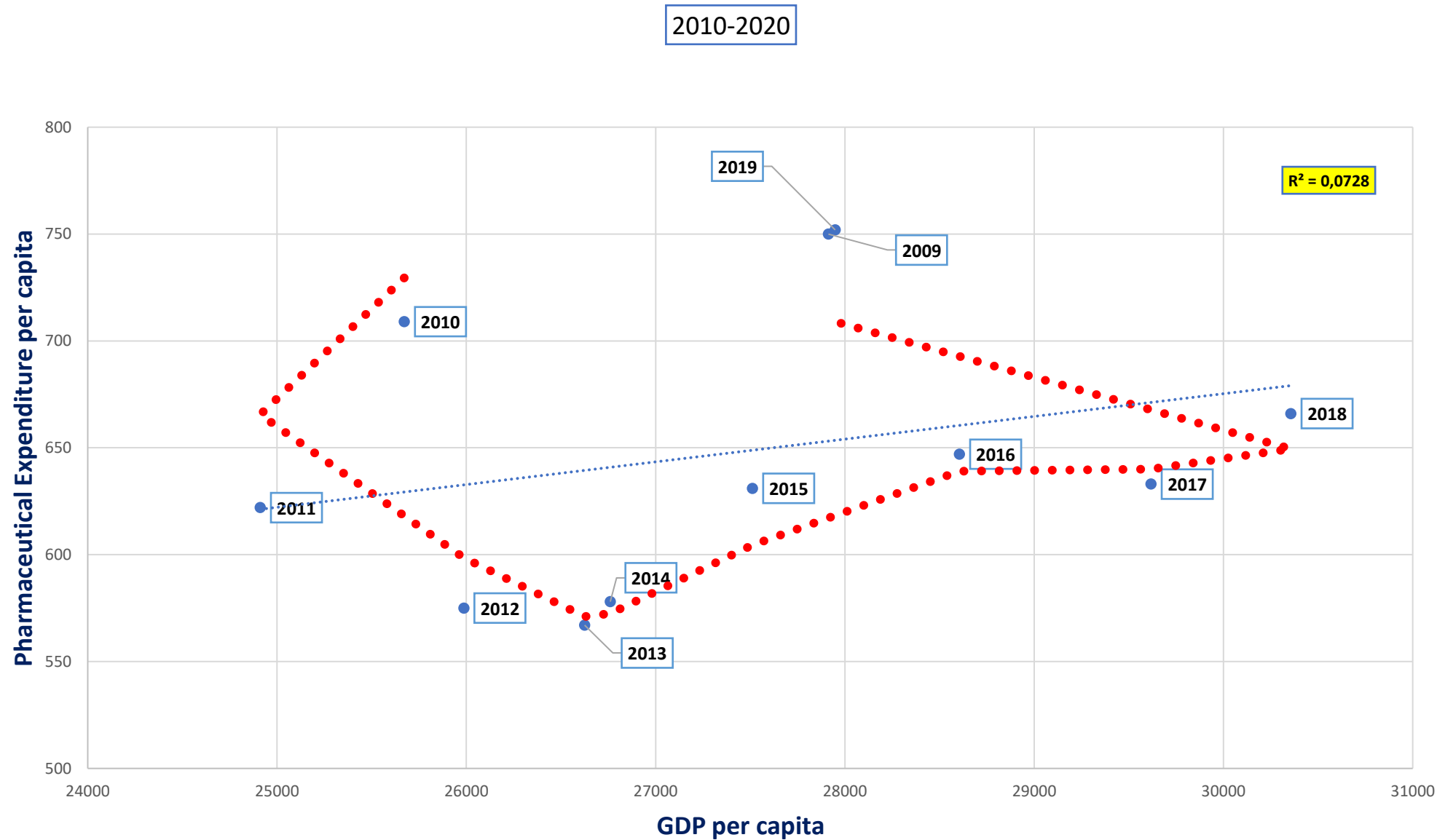
Health Expenditures in Greece



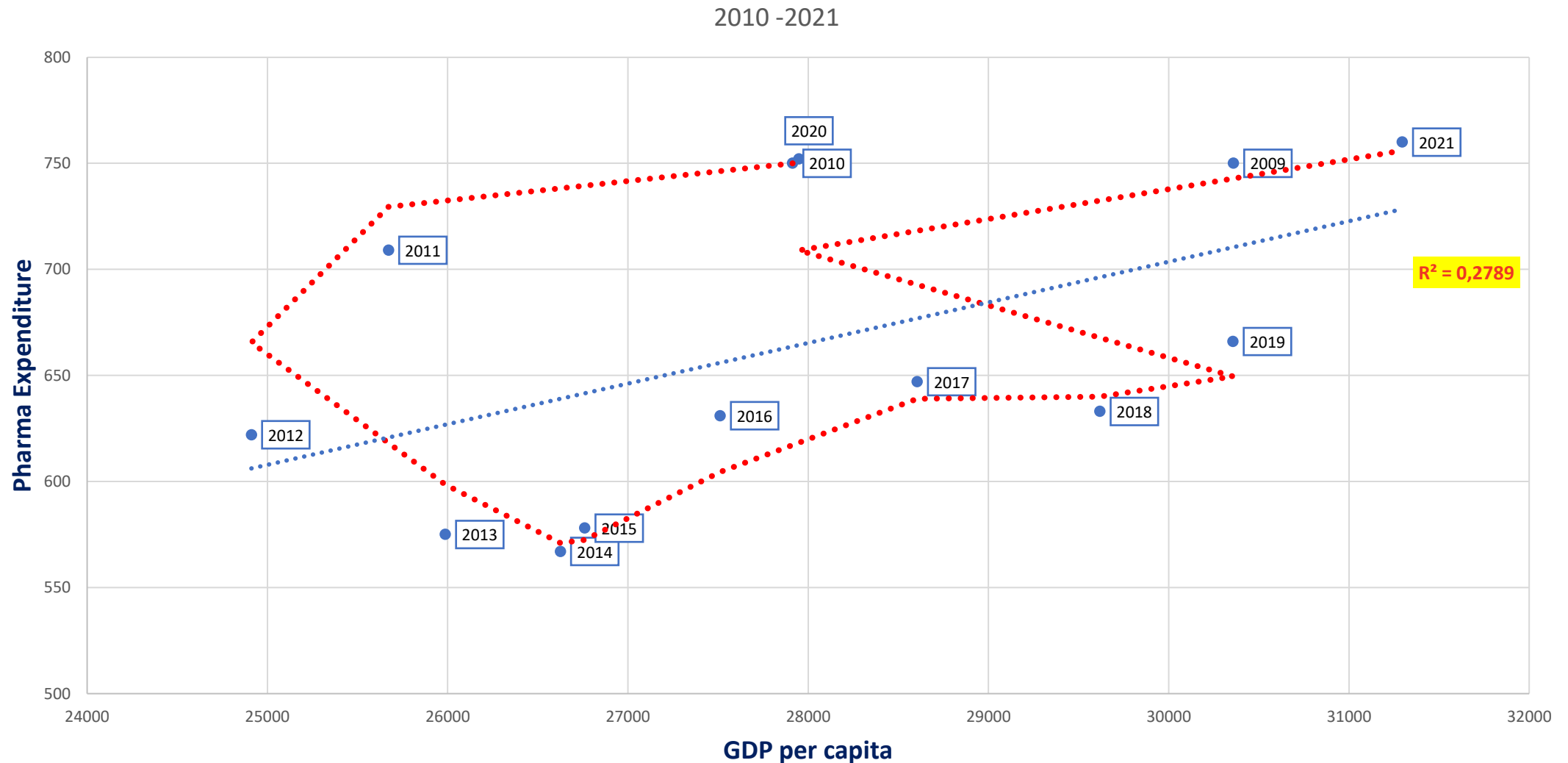
The growing issue of Austerities

The RRF Implementation has been a step in the right direction, but having innovative products pay more than 70% of their gross sales in austerities is not feasible and will lead to more shortages in pharmaceuticals.

Relation between Pharma Expend.& GDP 2010-2020

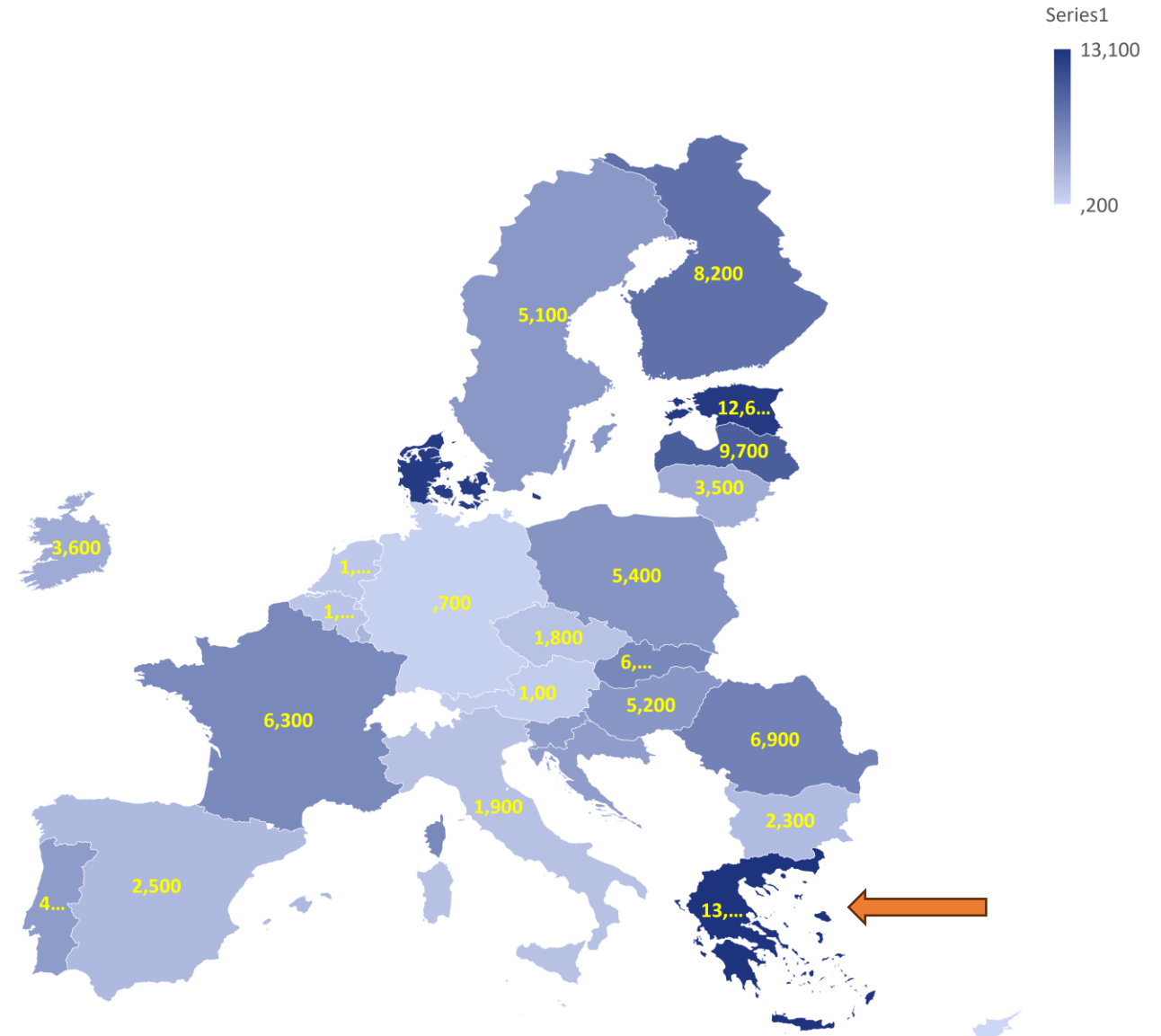


Relation between Pharma Expend.& GDP 2010-2022

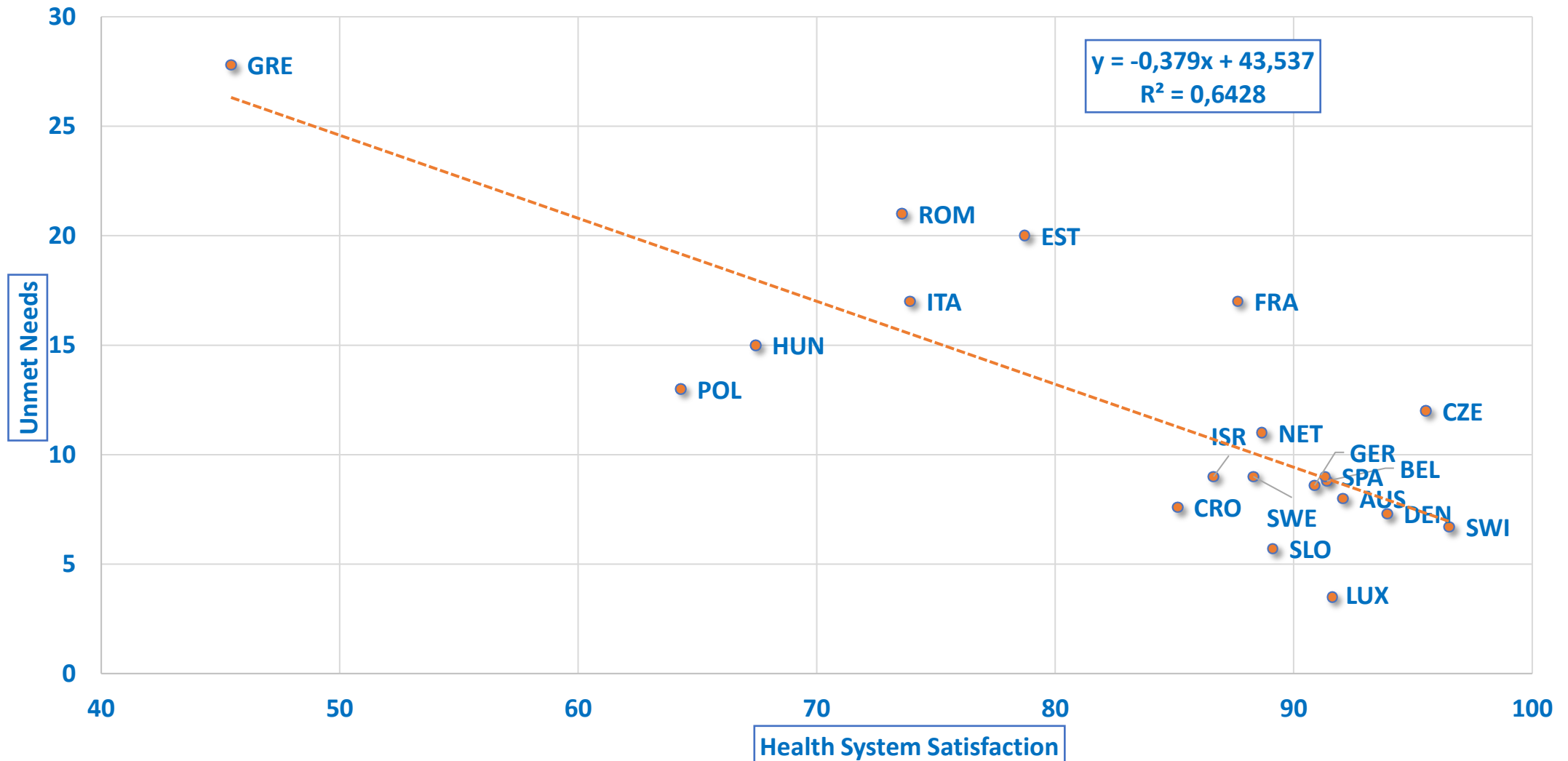


Greece= 13.1
EU-27 Average = 4.1

Unmet Needs
Share of persons aged
16 years or over
reporting unmet needs
for medical
examination or
treatment, 2022

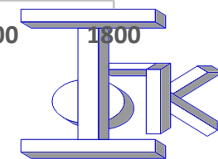
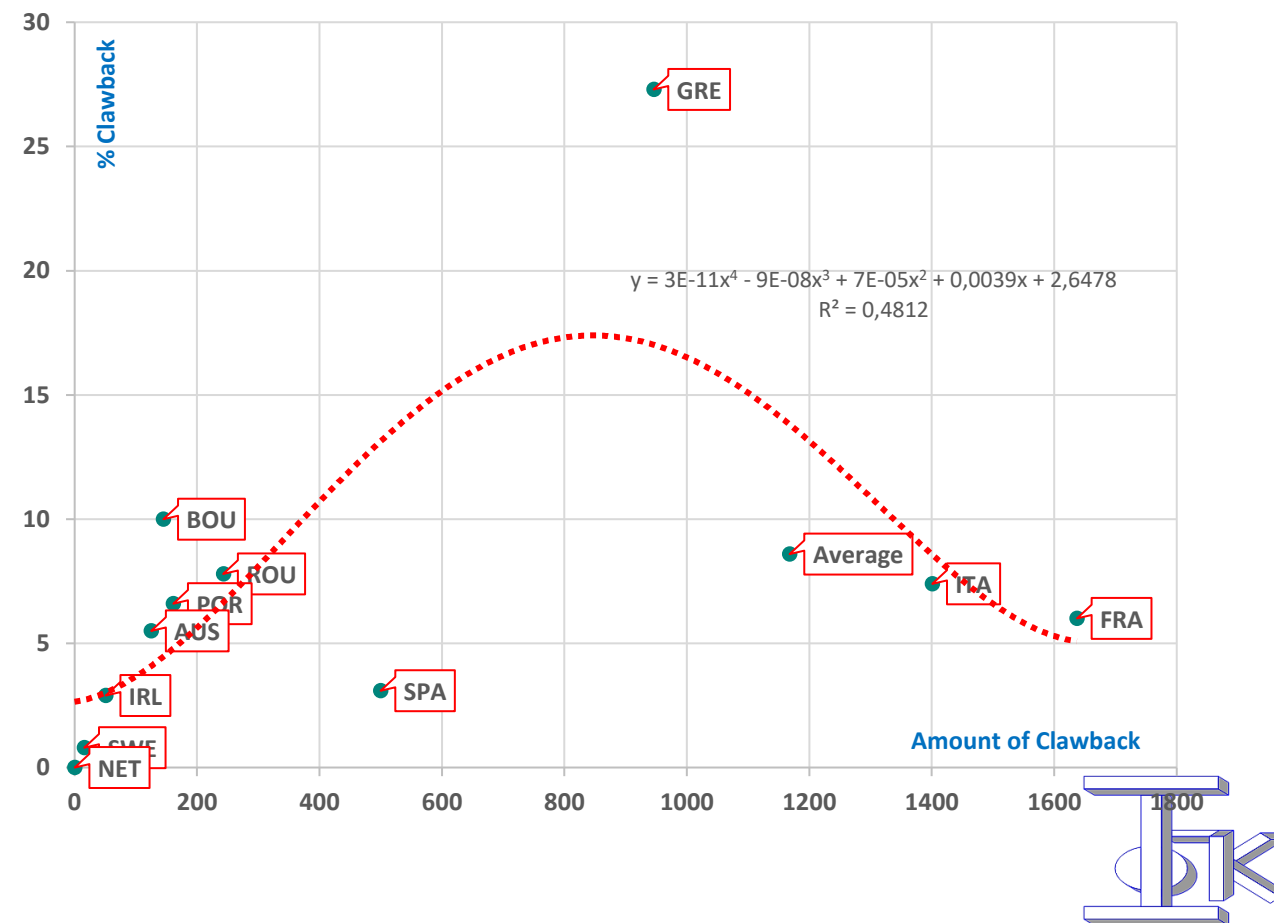
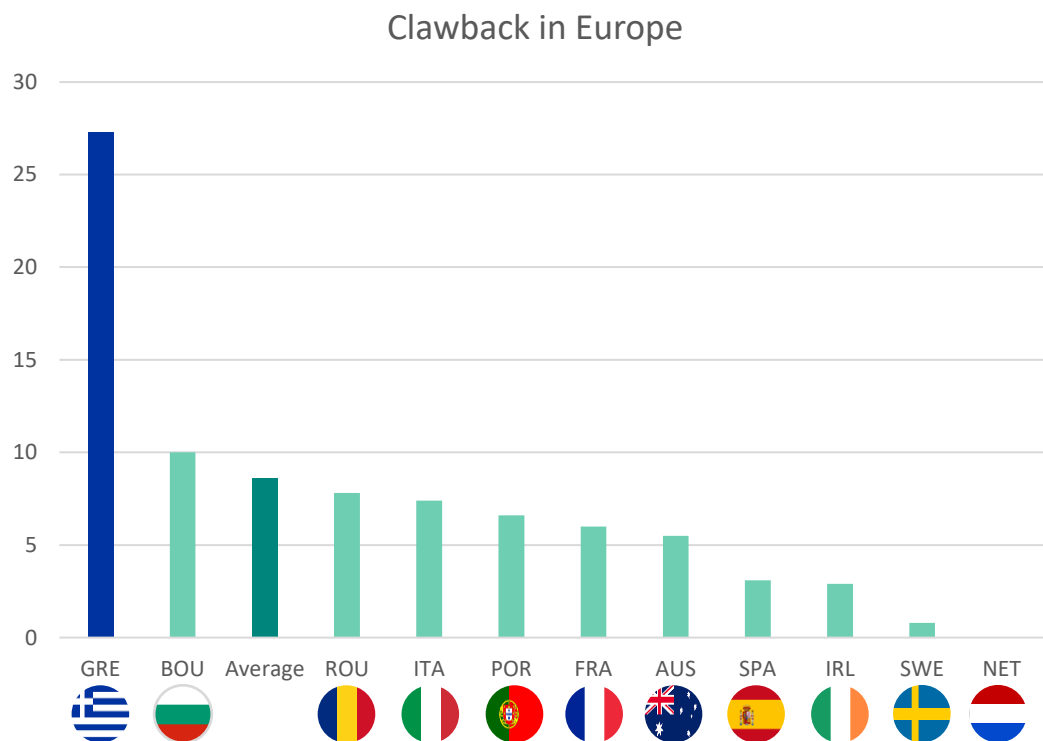


Negative relationship between Unmet Needs and Health System Satisfaction



The Greek Government appears to be adopting inefficient funding policies of pharmaceutical expenditure

Based on Laffer's curve, our analysis showed that the Greek Government imposes the **highest clawback (27.3%) in relation to other EU countries (8.6%)** without achieving an optimal and efficient utilization of limited resources.



Key opportunities and threats for the Greek Healthcare system



Opportunities:

- **Joint Clinical Assessment** is a framework which is anticipated to centralize key aspects of the clinical assessments, in this process **opportunities for training and improving** of the expertise of Greek stakeholders arises.
- **Data is the new gold!** The data which is being collected in Greece through IDIKA and the e-prescription could be an avenue of important **global investments** if utilized appropriately.
- Simplifying the “**bureaucratic**” process involved in **clinical trials**, could be key in leveraging further investments in this sector, especially if meaningful incentives are provided.



Threats :

- **Long lasting** issues which have been left **unaddressed** such as austerities become more complex and could lead to significant hazards for the healthcare system, patients and society as a whole.
- Trying to attract **investments** but not taking the **key steps** in this process to **optimize the process** along the way and “make it easy” for investors.
- **Having no data available** leads to decisions being made without awareness of the potential repercussions of each actions.
- Being a “**me too**” country in our approach instead of a country which tries to **differentiate itself and innovate**.



Thank you

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