



Citation for published version:

Csanádi, M, Ozierański, P, Löblová, O, King, L, Kaló, Z & Botz, L 2019, 'Shedding light on the HTA consultancy market: Insights from Poland', *Health Policy*, vol. 123, no. 12, pp. 1237-1243.
<https://doi.org/10.1016/j.healthpol.2019.08.008>

DOI:

[10.1016/j.healthpol.2019.08.008](https://doi.org/10.1016/j.healthpol.2019.08.008)

Publication date:

2019

Document Version

Peer reviewed version

[Link to publication](#)

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TITLE PAGE

Title: Shedding light on the HTA consultancy market: Insights from Poland

Running heading: Shedding light on the HTA consultancy market

Authors

Marcell Csanádi, *Doctoral School of Pharmacological and Pharmaceutical Sciences, University of Pécs, Pécs, Hungary* (marcell.csanadi@syreon.eu)

Piotr Ozierański, *Department of Social and Policy Sciences, University of Bath, Bath, UK* (po239@bath.ac.uk)

Olga Löblová, *Department of Sociology, University of Cambridge, Cambridge, UK* (olga.loblova@gmail.com)

Lawrence King, *Department of Economics, University of Massachusetts, Amherst, MA, USA* (lpking@econs.umass.edu)

Zoltán Kaló, *Department of Health Policy and Health Economics, Eötvös Loránd University, Budapest, Hungary* (zoltan.kalo@syreon.eu)

Lajos Botz, *Department of Pharmaceutics and Central Clinical Pharmacy, Faculty of Pharmacy, University of Pécs, Pécs, Hungary* (botz.lajos@pte.hu)

Corresponding author:

Marcell Csanádi

marcell.csanadi@syreon.eu

1142 Budapest Mexikói Str. 65/A

Funding

The authors received no specific funding for this work

Acknowledgement

We would like to thank Natalia Nichols for working on the data collection and Katharina Blankart for providing feedback on the earlier version of the manuscript

Conflict of interest statements

CM reports that he is also employed by Syreon Research Institute. However, their current work at Syreon Research Institute has no relevance for the research underpinning this current article.

PO's work on this study was supported by the scientific (non-commercial) grant "What can be learnt from the new pharmaceutical industry payment disclosures?" awarded by the Swedish Research Council for Health, Working Life and Welfare (FORTE #2016-00875).

OL reports consultancy fees from A&R Partners, Baxter AG and GADDPE.

LK has no conflict of interest to report.

ZK reports that he is also employed by Syreon Research Institute. However, their current work at Syreon Research Institute has no relevance for the research underpinning this current article.

LB has no conflict of interest to report.

Title: Shedding light on the HTA consultancy market for pharmaceuticals: Insights from Poland

Abstract

Research on health technology assessment (HTA) from a policy perspective typically examines public HTA bodies, with little attention devoted to how manufacturers develop their evidence submissions. Taking Poland as a crucial case, we explored the market of HTA consultancy firms which assist drug manufacturers in developing these submissions, called HTA reports. We reviewed 318 HTA reports from 2012-2015, data from the Polish National Company Registry, the content of HTA consulting firms' websites, and appraisal reports developed by the Polish HTA body. We identified HTA consultancy firms which developed 96-98% HTA reports. We found that the transparency of information about the authors of HTA reports provided by the HTA body had improved between 2012 and 2015. Six companies with market shares from 10 to 30% dominated the market. The market size was 5-6 million EUR annually. HTA consultancies had a broad service portfolio related to preparation of HTA reports. Over 90% of HTA reports did not meet the official minimum quality requirements, and only half of the resubmissions took into account remarks made by the HTA body. Our study provides insights into the structure, evolution and role of the for-profit HTA consultancy market as a crucial part of the public HTA system. This raises important policy points about transparency and regulation at the intersection of public and private sectors in HTA.

Keywords

health technology assessment; consultancy firms; evidence submissions; HTA consultancy market; HTA reports

1. Introduction

Policy studies of health technology assessment (HTA) have examined in detail public HTA bodies that evaluate evidence submissions supporting technologies applying for reimbursement [1-5]. However, little attention has been given to how manufacturers prepare these submissions. Recent research suggests that this often involves assistance provided by private sector consultancy firms specialising in data collection, evidence synthesis and report preparation [6-8]. Limited knowledge about the operation and characteristics of these firms is a major gap in research, given their role in the development of evidence underpinning subsequent HTA recommendations, often with major budgetary and public health implications. This paper contributes to addressing this gap by focusing on HTA consultancies in Poland, a country with a well-established HTA system.

Consulting in HTA is part of a broader phenomenon of drug companies outsourcing services to specialist consultancies. A key example of this is subcontracting the conduct of clinical trials to Clinical Research Organizations (CROs) [9], typically explained by the increase in the magnitude of clinical research and the drive towards a more efficient and flexible organization of research and development [10,11]. Similar reasons, namely limited “head-count” within pharmaceutical companies, coupled with the rise in regulatory requirements necessary for obtaining public funding, are likely to drive outsourcing to HTA consultancies.

HTA consultancy firms are private companies that generate or synthesize evidence and input for funding decisions. They employ experts in health economics, medicine, statistics and pharmacology, who can be described as “HTA professionals”. Like other experts involved in regulatory science [12], they have their professional conventions, experience and a shared body of knowledge and methods, developed in national and international networks, such as the International Society for Pharmacoeconomics and Outcomes Research and its local chapters, and specialized training programs, including MSc programs in health economics [13-15]. Given their highly specialized, knowledge based, service oriented and data driven approach, a strong HTA consulting market may function as an incubator of expertise, particularly important given the many recommendations to build capacity in order to strengthen HTA systems [17]. On the other hand, especially in countries with low public sector resources, the revolving door between consultancies and public HTA bodies has led to conflicts of interest, and often dramatic loss of expertise in the public sector [6,18-20].

To contribute towards assessing the risks and benefits associated with HTA consultancy markets, we provide a first exploratory overview of the HTA consultancy market in Poland. We focus on the following objectives. First, to identify HTA consulting firms that collectively make up the HTA consultancy market in Poland. Second, to

describe the HTA market structure and estimate its size. Third, to examine the evolution of the HTA consultancy market and the key activities of its players. Finally, to analyse the quality of HTA reports given to HTA consultancy firms by the Polish Agency for Health Technology Assessment (AHTAPol).

We select Poland as a crucial case because, first, HTA consultancy firms have developed in parallel to the institutionalization of public HTA in Poland. Notably, the first commercial HTA consultancy firms were established around 2002 in Kraków by former employees of the first public organization working on HTA [21]. Since then, experts representing those firms have contributed to the development of the official HTA guidelines issued by the AHTAPol [22-24]. Second, since its establishment in 2005 [25], the AHTAPol has consistently pursued an HTA model similar to the Single Technology Appraisal (STA) process developed by the Scottish Medicine Consortium and adopted by the English National Institute for Health and Care Excellence in 2005 [26,27]. Within the STA process, the core pharmacoeconomic evidence is generated by manufacturers. These evidence submissions, which we simply call “HTA reports”, are then evaluated by internal or external experts, whose appraisal (called “verification analysis” in Poland) forms the basis of subsequent discussions held by the members of an appraisal committee. Consistent reliance on this model of HTA in Poland has created conditions for the emergence of consultancy firms assisting manufacturers in preparing country-specific HTA reports based on the AHTAPol’s guidelines. Third, as HTA and the reimbursement processes are interconnected and some staff in HTA consultancy firms have worked for public institutions involved in drug reimbursement, HTA consultancies are uniquely positioned to advise manufacturers on the broader regulatory environment [19,20], which has evolved significantly since the early 2000s [28,29]. Fourth, as Poland is an important European pharmaceutical market there are a steady number of drugs applying for HTA appraisals annually ranging from approximately 80 to 100 [28,29]. This, too, is a good proxy for a strong demand for services provided by HTA consultancy firms. Finally, unlike in some other countries, the analysis of the HTA consultancy market in Poland has been enabled by the public availability of documents generated at various stages of the HTA process [30-34].

2. Materials and methods

We adopted a mixed methods study design, summarized in Table 1.

The extent to which we were able to identify HTA consultancy firms was affected by the transparency of information regarding the authors of the HTA reports, as provided by the AHTAPol. To identify the HTA consultancy firms we extracted data from HTA reports submitted by drug manufacturers and published on the

AHTAPol website [35]. We considered HTA reports submitted to the AHTAPol between 2012 and 2015. We selected 2012 as the start date because in this year the AHTAPol started publishing HTA reports under the provisions of the Reimbursement Act in 2011. The AHTAPol has a duty, introduced by the Reimbursement Act, to make HTA reports and corresponding verification analysis publicly available online [36]. We end our analysis in 2015, as this was the last year for which a full set of HTA reports and verification analyses was available at the time of data collection. From January to March 2018, we downloaded and reviewed all analyses available as part of each HTA report, namely decision problem analysis, clinical assessment, economic analysis, budget impact analysis, and rationalization analysis (these are proposals for addressing additional expenditure resulting from the reimbursement of the health technology; they outline where savings could be achieved in the pharmaceutical spending to ensure sufficient resources for the new drug). Given frequent redactions in the available analyses (e.g. author names or organizational details removed), we had to rely, where necessary, on logos, document design or website links to identify authors of analyses. Appendix I/A describes the complete process of identifying HTA consultancy firms.

To analyze the HTA market structure we calculated the market share of each identified company based on the HTA reports. We calculated the number of HTA reports prepared by HTA consultancy firms on a yearly basis. As one type of analysis in the HTA reports, decision problem analysis, was sometimes a subsection of the clinical assessment analysis or, at other times, a standalone document, we excluded decision problem analyses from the analysis.

We estimated the size of the Polish HTA market using the number of HTA reports prepared by each HTA consultancy firm and their annual net revenues from sales obtained from the Polish National Company Registry [37]. As the data included in the Registry was limited and insufficiently detailed, our calculations are based on certain assumptions, which are detailed in Appendix I/B, including our approach to market size estimation.

To describe evolution and the key activities of HTA consultancy firms we analyzed data downloaded in June and July 2018 from the websites of HTA consultancy firms we had identified. We extracted the year of establishment, location, mission statement, number of employees, services provided and partner or collaborator organizations from the English language version of the websites [38-43]. Due to the heterogeneity of information available on services and mission statements, information was coded inductively, and then at a later stage codes were merged and code families and networks were established, to best reflect the main themes emerging from the data.

Finally, we investigated the quality of the HTA reports, understood as compliance with the submission requirements specified by the Ministry of Health (MoH) [44]. Specifically, we examined verification analyses (VAs), which are documents in which the AHTAPol appraises HTA reports [36]. We considered VAs issued in 2012-2015 in which all four types of analyses included in this study (that is, clinical assessment, economic analysis, budget impact analysis, and rationalization analysis) were prepared by the same consultancy firm. We downloaded and analyzed the VAs in June 2018 and extracted data from sections in which the AHTAPol judged whether HTA reports had met the regulation on minimum requirements set out by the MoH [44]. For each company we calculated the percentage of HTA reports that met the MoH requirements among the total HTA reports. We also collected data from VAs on whether 1) at least one specific reason for not meeting the minimum requirements was provided by the AHTAPol; 2) the MoH requested the applicant to supplement the reimbursement application, including the HTA reports; 3) revised HTA reports were provided by the applicant; and 4) the revised HTA reports took into account the remarks for not meeting the minimum requirements.

We analyzed all data descriptively in Excel.

3. Results

In total, we analyzed 336 manufacturer submissions, with 63, 80, 106 and 87 coming from 2012, 2013, 2014 and 2015, respectively. We excluded 12 submissions as they were either not available online or were duplicated in the database. Duplication occurred when a manufacturer submitted exactly the same HTA report for different forms of administration of the same drug. We excluded six further applications because the analyses comprising the HTA reports were prepared jointly by more than one consultancy. Following on from this, 318 manufacturer submissions were analyzed (inclusion rate: 94.6%).

3.1 Transparency: Identification of HTA consultancy firms

The analyzed HTA reports contained 315 clinical assessments (CA), 314 economic analyses (EA), 313 budget impact analyses (BIA), and 242 rationalization analyses (RA). The company name was visible in 76%, 76%, 75% and 79% of the cases for CA, EA, BIA and RA, respectively. We were able to identify the HTA consultancy firms based on logos, document design or website links in additional 21%, 22%, 21% and 20% of the cases for CA, EA, BIA and RA, respectively. As a result, authors' names were identified in 97%, 98%, 96% and 99% of the cases for CA, EA, BIA and RA, respectively. Transparency of the AHTAPol's reporting in relation to consultancy firms increased steadily between 2012 and 2015, as the company name was visible in only around 40% of the cases in

2012, and around 95% of the cases in 2015 (Table 2). There were 227 HTA reports where the same HTA consultancy firm was identified for all four types of analyses.

3.2 Market structure: Calculation of market shares

For those CA, EA and BIA analyses with identifiable authors, all analyses had been prepared by an HTA consultancy firm, while in case of RA there were 2 cases where we identified a drug manufacturer and no HTA consultancy firm.

More than 90% of HTA report analyses were prepared by 6 HTA consultancy firms: HealthQuest, MAHTA, Instytut Arcana, HTA Consulting, Aestimo and Centrum HTA. (Table 3). During this period, HealthQuest had the largest market share with more than 25% for all four types of analyses. Two additional consultancy firms were identified, too, namely Pracownia HTA, NUEVO HTA. However, these companies prepared the analyses included in only 10 HTA reports over the four-year period.

The market shares of the six major companies were relatively stable over the years. The largest changes were observed in 2014, when the market share of HealthQuest increased over 30% and the market share of Centrum HTA decreased below 5% (Appendix 2). While HealthQuest maintained its market leader position in each year, the company with the lowest market share varied. Nevertheless, each major HTA consultancy firm developed at least four HTA reports annually.

3.3 Market size: Estimation of the HTA consultancy market

Based on the Polish National Company Registry data, we estimated the average annual market size at approximately €5.5 million (details of the assumptions behind the analysis are included in Appendix 1/B). Based on the annual revenues and the annual number of HTA reports we considered that the average revenue per HTA report was €70 000. Since our market estimation reflects the number of HTA reports per year, the largest market size was observed in 2014 with more than €6.5 million, and the lowest was observed in 2012 with €4 million. In a scenario analysis assuming lower revenues per HTA report (€60 000), we estimated approximately €4.5 million average annual market size, with the highest in 2014 around €5 million and lowest in 2012 around €3.5 million. In a scenario analysis assuming higher revenues per HTA report (€85 000) we estimated approximately €6.5 million average annual market size, with the highest in 2014 around €8 million and lowest in 2012 around €5 million.

3.4 Evolution and the key activities of HTA consultancy firms

There were two waves of establishing HTA consultancy firms in Poland, with the first two companies established in 2002 (HTA Consulting and Instytut Arcana), while the remaining four major companies were established between 2008 and 2011. The two companies with minor market shares, Pracownia HTA and NUEVO HTA, were also established around the second wave, in 2010 and in 2012, respectively. There were two companies established in Warsaw (HealthQuest, MAHTA), which were also the market leaders during the study period. All remaining companies, including the two smaller ones, were based in Kraków. This also indicates that the market shares by the two largest cities were almost even (a little higher in Kraków). Numbers of employees were available only for four companies from their websites. The two oldest companies, HTA Consulting and Instytut Arcana had the largest number of employees with more than 50 and more than 40, respectively, according to their websites. HTA consultancy firms established in the second wave had lower number of employees with reportedly more than 20 for MAHTA and 12 for Aestimo. We found no information on the number of employees in the remaining companies, including the market leader (HealthQuest).

Companies' mission statements were centered around supporting decision-making on medical technologies. Only one company (HealthQuest) did not state clearly in the mission statement that developing HTA reports was their core activity; instead, it implied as much by saying: "to support decision making in healthcare [based] on credible data and proper methods". Evidence-based medicine is another key concept used by HTA consultancy firms, which appeared in the mission statement of several companies. Yet another key concept is credibility, since 4 out of the 6 major companies mentioned it in their mission statement. Many mission statements emphasized the length of experience, especially in case of the more established consultancies, and the large number of HTA reports they had created.

The service portfolio of HTA consultancy firms was very wide. The core service offered by all companies was preparing HTA reports including all types of analyses required by the MoH and the AHTAPol. Three or more companies provided the following additional specialized services: strategic consulting, preparing qualitative studies (surveys, interviews), qualitative database analysis, consulting on negotiation strategies with payer representatives, real world data analyses and training courses. One or two HTA consultancy firms provided the following services: participating in advisory boards, performing systematic literature reviews, conducting network meta-analyses, performing feasibility studies or rapid reviews and conducting epidemiological or pharmacovigilance studies.

Two companies (Instytut Arcana, HTA Consulting) emphasized providing services outside Poland – in the Central and Eastern European region. Further, three companies mentioned partner organizations. Specifically, HTA Consulting established an alliance in collaboration with a Hungarian consultancy firm; Instytut Arcana was found to be part of a global organization in population health intelligence; and HealthQuest started a strategic cooperation with a company focusing on medical data management, statistics and programming. Collaborations with universities were not mentioned, although it was apparent that some companies key personnel had university affiliations as well (e.g. Warsaw School of Economics, Medical University of Warsaw and Jagiellonian University in Kraków).

3.5 Quality of HTA reports evaluated by the AHTAPol

According to the reviewed VAs issued by AHTAPol, out of the 227 HTA reports in which all four reviewed analyses were prepared by the same company, only 15 (6.6%) satisfied the minimum quality requirements set out by the MoH. According to the AHTAPol, 207 (91.2%) HTA reports did not meet the requirements, and the remaining five cases (2.2%) were unclear. The AHTAPol explained why the requirements were not met only in 70 (33.8%) cases, did not provide any reasons in 136 cases (65.7%), and in one case a reason was redacted. Within reports that did not meet the requirements, the MoH requested the applicant to revise the HTA report in 162 (78.3%) cases, and in the remaining 45 (21.7%) cases this was not clear from the VAs. Within the 207 reports that did not meet the requirements the applicant provided revised analyses in 157 (75.8%) cases. In 47 (22.7%) cases this was unclear, and in 3 (1.5%) cases revised analyses were not provided. Finally, we analyzed those sections of the VAs which reported whether the revised analyses took into account all AHTAPol's remarks. From those 157 revised analyses when the applicant provided revised analyses, 71 (45.2%) took into account the remarks, 62 (39.5%) did not and in 24 (15.3%) cases it was not clear.

There were small differences between the consultancy firms in the share of HTA reports not meeting the MoH requirements as reported by the VAs (Table 4). The highest percentage was observed for Centrum HTA (95%) and the lowest for HTA Consulting (88.9%) However, a relatively larger difference was observed in terms of the reasons for not meeting the requirements. In this regard, reports by MAHTA and Instytut Arcana received reasons by the AHTAPol for not meeting the minimum requirements in 39.5% and 39.3% of the cases, respectively. However, for instance reports by HTA Consulting received reasons for not meeting the requirements only in 21.9% of the cases. The percentage of HTA reports in which the MoH requested supplementing the reimbursement application ranged from 82.3% (HealthQuest) to 72.7% (Aestimo). The share of HTA reports for which revised analysis was submitted ranged from 79% (HealthQuest) to 68.2% (Aestimo). We observed a relatively large

difference in the percentage of the reports in which the revised analyses took into account the AHTAPol's recommendations for revising the analyses. Here, the rate of reports building on AHTAPol's advice was the highest for Aestimo and HTA Consulting (60% and 56.5%, respectively); this rate was the lowest for MAHTA and Centrum HTA (33.3% and 30.8%, respectively).

4. Discussion

In this paper, we identified key players of the Polish HTA consultancy market for pharmaceuticals, described its size, structure and evolution, and analysed the AHTAPol's comments on the quality of HTA reports prepared by HTA consultancy firms. Our research contributes to the literature on stakeholder involvement in HTA [45-47] by demonstrating that the scope of stakeholders in HTA to consider is broader and may include private-sector companies. Further, in contrast to studies focusing on later stages of the HTA process, especially the discussions held by appraisal committees, here we point to the less visible stage of technology assessment [28-30,36], which has so far largely escaped research attention.

Researching HTA consultants reflects broader transparency challenges facing HTA systems. Unlike many public HTA bodies, expert consulting has no specific regulations pertaining to, for example, putting information on its activities in the public domain. The availability of information on consultants, then, largely depends on the openness of the public bodies with which they interact. In the field of HTA, any systematic examination of the market for HTA services requires, at the very least, publicly available HTA reports, which include the names of their authors. In this regard, countries like Poland, which adopted HTA later, can, perhaps surprisingly, could be more transparent than early adopters [36]. In this regard, consistent with recent research on the transparency of the AHTAPol's work [30], we found that the transparency of information about the authors of HTA reports provided by the AHTAPol had improved steadily between 2012 and 2015. The evaluation of the quality of analyses developed by consultants requires even more detailed information about the outcomes of appraisal processes undertaken by HTA bodies. For instance, a recent study into HTA in Hungary was unable to use documentary analysis, unlike the present paper, because relevant data was not publicly available [6].

We found that the HTA market for pharmaceuticals in Poland was dominated by six companies, with new market entrants unable to gain larger shares. This suggests that the dominant HTA consultancy firms have accumulated significant expertise and created strong working relationships with their clients. These findings are consistent with earlier research showing the sustained influence on the Polish HTA system of the first cohort of experts who

received formal training in HTA [20,21]. A similar market structure including 3-4 major HTA consultancy firms was also found in Hungary, a country with a comparable HTA model and history [6]. Future empirical research could test whether this model holds in Western European countries.

The size of the Polish HTA consultancy market for pharmaceuticals, estimated at €5-6 million annually, reflects Poland's role as an important market in the region. Correspondingly, the market was almost two times larger than the same market in Hungary estimated at around €3-3.5 million annually using a similar method of calculation [6]. Notably, the size of Poland's HTA market for pharmaceuticals considerably exceeds the AHTAPol's annual budget of €2.5 million [48]. Similarly, with at the least 120 employees, HTA consultancy firms together dispose of significant manpower compared to the AHTAPol, which has 65 full-time equivalent employees [48]. The contrast between resources available to the public and commercial HTA sector is a function of the Single Technology Appraisal model of the HTA process, which confines the role of public HTA bodies to evaluating evidence submitted by manufacturers. In the Polish context, this model of HTA was introduced and solidified, via subsequent versions of AHTAPol's HTA guidelines, largely based on contributions from experts from the major HTA consultancies [22-24]. In fact, the emergence of some of the first consultancies preceded the establishment of the AHTAPol as such, which can be interpreted as the public HTA body complementing the nascent HTA market, and not the other way round. This may be problematic, especially given the well-documented permeability of the commercial and the public HTA sectors, including high-level transfers from the AHTAPol to HTA consultancies, which potentially leads to conflicts of interest [19,20].

Our results also suggest that HTA consultancy firms considerably expanded their services. They started their activities by preparing HTA reports for manufactures in the early 2000s [35], and although this remains their core activity, new types of services, such as strategic consulting, organizing training courses or preparing qualitative studies emerged throughout the years.

Finally, our findings based on AHTAPol's assessments of commercial HTA reports, called verification analyses, are perhaps the most puzzling. Here we established that the majority of HTA reports did not meet official MoH criteria, and only about half took into account the AHTAPol's formal feedback in their resubmissions. Although, as noted below, our findings are themselves determined by the quality and consistency of reporting of relevant information by the AHTAPol, this finding raises concerns about a HTA process relying heavily on the quality of manufacturer submissions. Of course, the commercial evidence is scrutinized by AHTAPol's staff developing verification analyses, and the number of shortcomings identified underscores the critical importance of the

appraisal stage of the HTA process. However, the apparent scale of the problem is considerable, and is likely to translate into increased workload for the publicly funded HTA body, which, as mentioned above, is significantly under-resourced compared to the consultancy sector.

The apparent low quality of HTA reports might have several reasons. One, it could suggest that the MoH minimum requirements are not fit for purpose and their guidance does not correspond to the practical possibilities of what data HTA consultancies, or perhaps their industry clients, can deliver. However, this interpretation does not sound plausible because there seem to have been no formal policy discussions on calls for the revision or refinement of the minimum requirements. Two, the AHTAPol might not use the requirements faithfully (e.g. by interpreting them overly strictly or expansively). To explore whether this is the case it would be important to check whether the scope of AHTAPol's requests for revisions was consistent for all consultancies and pharmaceutical companies, to exclude possible preferential application of rules for some. Finally, some consultancies might have not understood the requirements and are unable, or unwilling, to learn from their past mistakes, as suggested by the variable and relatively low rates of companies taking the AHTAPol's comments into account when submitting revised analyses. Given that the HTA consultancy market comprises just a handful of key players, this would be worrying and put a question mark over whether the HTA market operates in the public interest.

Our study has several important limitations. First, our codebook for identifying the HTA consultancy firms was developed via an iterative process, possibly not identifying all authors. Second, the market size estimation is only a rough estimate, since data from the Polish National Company Registry was limited. Future research could possibly verify our indicative findings regarding the estimated market size via primary data collection from HTA consultancy firms. Third, the thematic analysis of the websites of the HTA consultancy firms relied on companies' self-presentations. While this is useful to gain a sense of the companies' public presence, it does not necessarily provide reliable information on the full spectrum of their business activities and priorities. Fourth, one specific part of the HTA reports, decision problem analysis, was not included in our study, given the lack of consistency in HTA reports. Finally, our analysis of the quality of HTA reports was limited to the understanding of "quality" as per the minimum quality requirements by the Ministry of Health, which could be better framed as formal completeness or comprehensiveness of HTA reports, rather than an assessment of more substantive quality issues such as the choice of comparators or validity of economic models. Furthermore, the information included in verification analyses was often unclear, which is why we were unable, at times, to collect the explicit reasons of why HTA reports did not meet the official requirements.

5. Policy recommendations

Based on our Polish case study, we can extrapolate several takeaways regarding HTA consultancy markets for other countries, particularly those that rely on the STA model. First, there is a clear need for detailed reflection on conflicts of interest that may emerge at the intersection of public HTA bodies and HTA consultancies. The permeability of the two sectors is likely not a Polish exception and appropriate, context-specific regulation of the “revolving door” in HTA should be considered. Second, when HTA reports are not meeting the official requirements, further investigations are required to explore the underlying reasons. Third, HTA bodies should periodically subject their relationships with individual HTA consultancies to conduct critical analysis to eliminate potential bias. Fundamentally, to allow for external analysis, public availability of documentation of HTA submissions, including information on authors of HTA reports, is paramount to ensure the transparency of the HTA process. Reasons for confidentiality of this information should be re-interrogated in countries that practice extensive redactions or do not make HTA documentation public.

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Appendix

Appendix I: Detailed methodology of applied methods

I/A: Identification of HTA consultancy firms

Since the documents of HTA reports were frequently redacted we scanned them carefully to identify any feature of HTA consultancy firms that could be helpful (i.e. company logos, document design and style or website links within the text). From these features a code book was developed. This was an iterative process, therefore our codebook was evolving during the data extraction. When our codebook was considered to be complete after reviewing the documents of the first two years (2012, 2013), we re-evaluated those, where the HTA consultancy firm was not identified and double checked those that were already identified. We had separate coding for those documents where the company name was not blacked out, and for those when the name was blacked out and our codebook was used to identify the company.

I/B: Estimation of the market size

Annual net revenues from sales provided by the Polish National Company Registry was used in order to estimate market size. Since the received net revenue data was available only for two of the major HTA consultancy firms, these were used as bases for estimating the total market with the following calculations. First the annual net revenues were divided by the annual number of submitted HTA reports in case of the two companies for each years. Then the mean of these ratios was multiplied with the annual number of submissions for those companies where data was missing on the net revenue. The sum of these multiplications were used for estimating the total market size. In scenario analyses the lowest and the highest ratios of the annual net revenue / annual number of submitted HTA reports were used. These calculations assume that the major HTA consultancy firms in Poland generate similar revenue at company level by preparing an HTA report. Although this assumption cannot be validated, this method seemed to be the only reasonable option for the market size estimation within the scope of this study. Since we aimed to calculate a rough estimate, data was not corrected for inflation and current exchange rate from 2018 July was used to express values in EUR. Further data from the Registry's website was scrapped to complement information collected from the companies' websites on year of establishment and location.

Appendix 2: Market share of consultancy firms according to the four types of analyses in the HTA reports reported for each years of the study interval

Clinical assessment	No. analyses	Health Quest	Mahta	Instituto Arcana	HTA consulting	Aestimo	Centrum HTA	Other firms	Not identified
2012	57	22.8%	10.5%	14.0%	21.1%	8.8%	10.5%	3.5%	8.8%
2013	75	30.7%	21.3%	14.7%	12.0%	9.3%	10.7%	1.3%	0.0%
2014	98	33.7%	13.3%	14.3%	13.3%	14.3%	4.1%	5.1%	2.0%
2015	85	22.4%	18.8%	16.5%	14.1%	8.2%	14.1%	4.7%	1.2%
Economic analysis	No. analyses	Health Quest	Mahta	Instituto Arcana	HTA consulting	Aestimo	Centrum HTA	Other firms	Not identified
2012	57	24.6%	10.5%	12.3%	21.1%	10.5%	10.5%	3.5%	7.0%
2013	75	30.7%	21.3%	14.7%	12.0%	9.3%	10.7%	1.3%	0.0%
2014	97	34.0%	13.4%	14.4%	12.4%	14.4%	4.1%	5.2%	2.1%
2015	85	22.4%	18.8%	16.5%	14.1%	8.2%	14.1%	4.7%	1.2%
Budget impact analysis	No. analyses	Health Quest	Mahta	Instituto Arcana	HTA consulting	Aestimo	Centrum HTA	Other firms	Not identified
2012	56	23.2%	10.7%	10.7%	21.4%	8.9%	10.7%	3.6%	10.7%
2013	74	28.4%	21.6%	14.9%	12.2%	9.5%	10.8%	1.4%	1.4%
2014	98	33.7%	13.3%	14.3%	12.2%	14.3%	4.1%	5.1%	3.1%
2015	85	22.4%	18.8%	16.5%	14.1%	8.2%	14.1%	4.7%	1.2%
Rationalization analysis	No. analyses	Health Quest	Mahta	Instituto Arcana	HTA consulting	Aestimo	Centrum HTA	Other firms	Not identified
2012	40	27.5%	12.5%	5.0%	20.0%	7.5%	7.5%	7.5%	12.5%
2013	58	29.3%	25.9%	8.6%	13.8%	6.9%	10.3%	1.7%	3.4%
2014	74	35.1%	13.5%	17.6%	13.5%	13.5%	4.1%	2.7%	0.0%
2015	70	22.9%	20.0%	14.3%	15.7%	10.0%	11.4%	4.3%	1.4%