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Understanding Policies For Biosimilar Adoption In India: A Narrative Analysis

Sidhartha Sahai Malhotra[1], Pavitra Solanki[2], Gaurav Kumar Jain[3], Tanveer Naved[4]*

[1,] *Amity Institute of Pharmacy, Noida, Uttar Pradesh-201301*
[2]*Department of Pharmaceutics, Delhi Pharmaceutical Sciences and Research University, Pushp Vihar, Sec-3, New Delhi-110017*
[3]*Asstt. Drugs Controller, India, New Delhi*
[4*]Professor, Department of Pharmacognosy and Phytochemistry, Amity Institute of Pharmacy, Noida, Uttar Pradesh-201301

***Corresponding author:** Dr. Tanveer Naved
*Email: tnaved@amity.edu

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Abstract

India's biosimilar adoption policy encompasses a comprehensive regulatory framework guided by the Central Drugs Standard Control Organization (CDSCO) and the Department of Biotechnology (DBT). The 2016 Guidelines on Similar Biologics outline stringent preclinical, clinical, and post-marketing requirements to ensure biosimilar safety and efficacy. Market access is enhanced through pricing regulation by the National Pharmaceutical Pricing Authority (NPPA) and increasing insurance coverage. Intellectual property laws balance innovation with accessibility. Moving forward, India aims to harmonize its regulations with global standards, introduce fast-track approvals, and invest in training and infrastructure. Public awareness programs, insurance reforms, R&D incentives, and collaborative research are vital for enhancing market access and fostering innovation. Legal reforms and efficient dispute resolution mechanisms are necessary to balance innovation and access. These efforts will bolster India's biosimilar sector, addressing domestic health needs and establishing India as a global biosimilar leader.

Keywords: Biosimilars; Policy; Biosimilar adoption; CDSCO

Introduction

Biosimilars are biopharmaceutical drugs that closely resemble an already approved biological product, known as the reference product. As patents for several major biologics expire, biosimilars offer a promising means to lower healthcare costs and enhance patient access to essential therapies[1]. In India, with its expanding pharmaceutical industry and significant healthcare needs, particularly for diseases like cancer and autoimmune disorders, understanding the policies that influence biosimilar adoption is vital for both market players and healthcare providers. The CDSCO, under the Ministry of Health and Family Welfare, is the primary regulatory body for biosimilars in India. Guidelines on Similar Biologics (2016) developed by CDSCO and the Department of Biotechnology (DBT), provide a framework for the approval of biosimilars[2]. They cover aspects such as manufacturing, preclinical studies, clinical trial requirements, and post-marketing surveillance. Biosimilars must undergo rigorous preclinical and clinical trials to demonstrate similarity to the

reference biologic in terms of safety, efficacy, and quality. Head-to-head comparisons with the reference biologic are required to establish bio similarity. Continuous monitoring of biosimilars after they are approved ensures ongoing safety and efficacy[3]. Navigating the patent landscape is crucial for biosimilar manufacturers. India's patent laws balance between innovation and accessibility, often allowing for early entry of biosimilars post-patent expiry of innovator biologics. Aligning India's regulatory standards with global benchmarks such as those of the US FDA and EMA will facilitate international acceptance of Indian biosimilars. India's policy framework for biosimilar adoption is robust, yet there is significant scope for enhancement. Strengthening regulatory frameworks, building capacity, improving market access, encouraging innovation, and ensuring a balanced IPR environment are crucial steps towards a sustainable and thriving biosimilar market. This will not only meet domestic healthcare needs but also position India as a global leader in the biosimilar industry[4].

Regulatory Framework

The Central Drugs Standard Control Organization (CDSCO) oversees India's regulatory framework for biosimilars. The "Guidelines on Similar Biologics," initially released in 2012 and updated in 2016, detail the requirements for developing and approving biosimilars. These guidelines stress the need to demonstrate equivalence in quality, safety, and efficacy with the reference biologic through detailed analytical, preclinical, and clinical studies[5]. A critical component of the regulatory framework is post-marketing surveillance, which involves continuous monitoring of biosimilars after they have been approved and are available in the market. Manufacturers must implement comprehensive pharmacovigilance programs, which include the collection and analysis of data on adverse effects and the submission of periodic safety update reports (PSURs). Additionally, Risk Management Plans (RMPs) are mandatory, detailing strategies to identify, assess, and mitigate potential risks associated with the use of biosimilars. This ongoing surveillance ensures that any issues are promptly identified and addressed, maintaining public trust in biosimilar products[6,7].
The approval process for biosimilars in India is stringent and multi-phased. Initially, preclinical studies are conducted, including in vitro and in vivo tests, to demonstrate biosimilarity. These studies are followed by a series of clinical trials. The clinical development process includes pharmacokinetic (PK) and pharmacodynamic (PD) studies to assess the biosimilar's behavior in the body compared to the reference product. Subsequently, confirmatory clinical trials are required to establish therapeutic equivalence. This thorough approach ensures that biosimilars meet the high standards set for safety and efficacy[4,8].
A critical component of the regulatory framework is post-marketing surveillance, which involves continuous monitoring of biosimilars after they have been approved and are available in the market. Manufacturers must implement comprehensive pharmacovigilance programs, which include the collection and analysis of data on adverse effects and the submission of periodic safety update reports (PSURs). Additionally, Risk Management Plans (RMPs) are mandatory, detailing strategies to identify, assess, and mitigate potential risks associated with the use of biosimilars. This ongoing surveillance ensures that any issues are promptly identified and addressed, maintaining public trust in biosimilar products[9,10].
Market access and pricing of biosimilars are also carefully regulated. The National Pharmaceutical Pricing Authority (NPPA) plays a pivotal role in ensuring that biosimilars are priced affordably, balancing the need to make these therapies accessible to patients while providing fair returns to manufacturers. The inclusion of biosimilars in public and private health insurance schemes further

enhances their accessibility, ensuring that more patients can benefit from these cost-effective alternatives to innovator biologics[11].

Manufacturing standards are another cornerstone of India's biosimilar regulatory framework. Compliance with Good Manufacturing Practices (GMP) is mandatory, ensuring that biosimilars are produced consistently and meet the required quality standards. This includes rigorous controls over the production processes, equipment, and facilities used in manufacturing, thereby safeguarding the integrity and reliability of biosimilars[12].

Navigating the intellectual property rights (IPR) landscape is crucial for biosimilar manufacturers. India's patent laws are designed to strike a balance between fostering innovation and ensuring public access to affordable medicines. This often facilitates the earlier entry of biosimilars into the market once the patents on innovator biologics expire, encouraging competition and reducing costs for patients[13].

Efforts are underway to harmonize India's regulations with global standards set by organizations like the US FDA and the European Medicines Agency (EMA). This alignment will not only streamline the approval process but also enhance the global competitiveness of Indian biosimilars. Investments in capacity building, such as training regulatory personnel and upgrading infrastructure, are essential to support these advancements. Additionally, initiatives like fast-track approval processes for critical biosimilars, public awareness campaigns, and incentives for research and development are being explored to foster innovation and improve market access.

Biosimilars adoption

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Key components of the regulatory framework include:

1. Comparability Exercise: A systematic process comparing the biosimilar to the reference biologic in terms of molecular structure, biological activity, and clinical performance.

2. Clinical Trials: Comprehensive clinical trials are required to confirm biosimilarity, focusing on pharmacokinetics (PK), pharmacodynamics (PD), and immunogenicity.

3. Post-Marketing Surveillance: Strong pharmacovigilance programs are necessary to track the long-term safety and effectiveness of biosimilars after they reach the market.

Steps involved in biosimilars approval in India:

1. Development Phase

Preclinical Studies: Conduct in vitro and in vivo studies to demonstrate the biosimilarity of the biosimilar candidate to the reference biologic.

2. Clinical Development

Phase I: Conduct pharmacokinetic (PK) and pharmacodynamic (PD) studies to compare the biosimilar's behavior in the body with that of the reference biologic.

Phase II/III: Conduct confirmatory clinical trials to demonstrate comparable efficacy and safety to the reference biologic.

3. Submission to Regulatory Body

Prepare Dossier: Compile all necessary data, including Chemistry, Manufacturing, and Controls (CMC), preclinical, and clinical data.

Submit Application: Submit the complete dossier to the Central Drugs Standard Control Organization (CDSCO).

4. Review by CDSCO and DBT

CDSCO Review: Evaluate the dossier to ensure that the biosimilar meets the required standards of quality, safety, and efficacy.

DBT Review: Assess the manufacturing process and controls.

5. Grant of Marketing Authorization

Approval: If the biosimilar meets all regulatory requirements, CDSCO grants marketing authorization.

6. Post-Marketing Surveillance

Risk Management Plan (RMP): Implement strategies to monitor and manage risks associated with the biosimilar.

Pharmacovigilance: Conduct ongoing surveillance, including adverse event reporting and periodic safety update reports (PSURs), to ensure the continued safety and efficacy of the biosimilar.

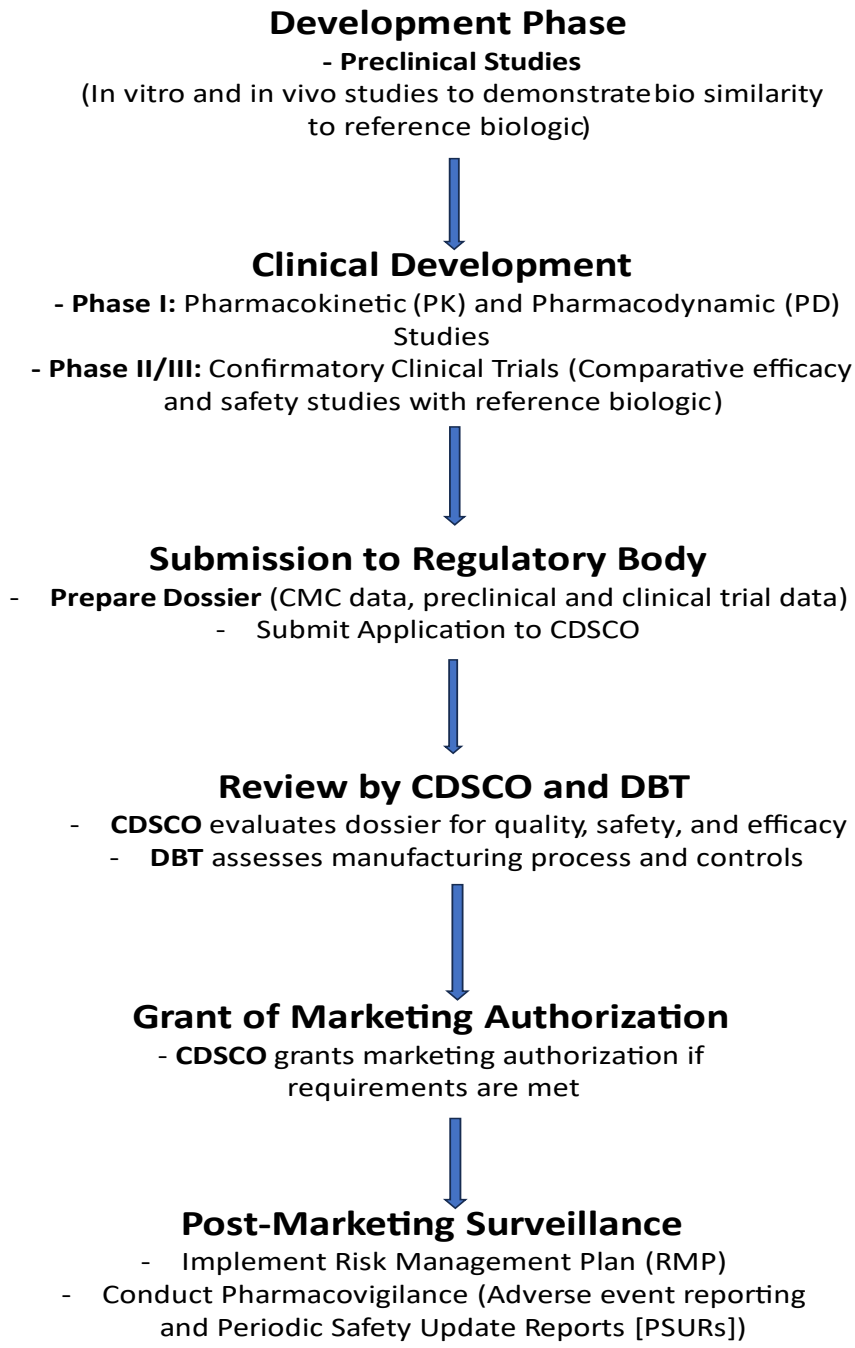

Figure 1: Flow diagram representing approval/registration process of biosimilars in India

Market Dynamics

India's biosimilar market is expanding swiftly, driven by the country's robust generic drug industry, growing healthcare spending, and the increasing incidence of chronic diseases. Leading Indian pharmaceutical firms, such as Biocon and Dr. Reddy's Laboratories, are at the forefront of biosimilar development and commercialization[16].

However, biosimilar adoption faces several challenges:

1. Development Costs: Developing biosimilars is more complex and costly than producing small-molecule generics. The expense of thorough comparability studies and clinical trials can be substantial.
2. Awareness Among Physicians and Patients: There is a need to educate healthcare providers and patients about the safety and efficacy of biosimilars to build confidence and acceptance.
3. Reimbursement Policies: Unclear and unsupportive reimbursement policies can impede biosimilar adoption. Streamlining these policies and offering incentives for using biosimilars are crucial.

Government Initiatives and Support

The Indian government has implemented several measures to promote biosimilar development and uptake. These include:
1. Policy Support: The National Biopharma Mission, initiated by the Department of Biotechnology (DBT), supports the biosimilar industry through funding, infrastructure development, and skill enhancement programs.
2. Public-Private Partnerships: Collaborative efforts between government entities and private companies to encourage innovation and simplify the regulatory process for biosimilars.
3. Price Controls: The National Pharmaceutical Pricing Authority (NPPA) regulates the prices of essential drugs, including biosimilars, to ensure they remain affordable and accessible.

Current Status

Europe pioneered the establishment of the regulatory framework for the approval of biological products, marking a significant milestone in global healthcare. The first biosimilar, Omnitrope, a recombinant human growth hormone, gained approval from the European Medicines Agency (EMA) in 2006. In contrast, the United States lagged behind, only approving its first biosimilar, filgrastim-sndz, in 2015, despite having approved the reference product filgrastim in 1991. Since then, the FDA has greenlit numerous biosimilars for treating various conditions, with pegfilgrastim-jmdb being the most recent, sanctioned in June 2018 to mitigate infection risks post-chemotherapy. Today, a plethora of biosimilars developed by biopharmaceutical companies are utilized globally, spanning diverse therapeutic areas from diabetes to cancer[4,17].
India boasts a robust biosimilar ecosystem, positioning its pharmaceutical companies as leaders in the global biosimilars market. India's first biosimilar was approved as early as 2000 for hepatitis B, despite the absence of specific guidelines at the time. Since then, several Indian biopharmaceutical firms have introduced biosimilars to the market. Recently, an Indian company received FDA approval to market its novel biologic, marking a significant milestone. India's regulatory agencies refer to biosimilars as "similar biologics," despite the lack of specific guidelines initially. Recognizing the need for regulation, the Central Drugs Standard Control Organization (CDSCO) collaborated with the Department of Biotechnology (DBT) to develop guidelines in 2012, revised in 2016, addressing manufacturing, quality, safety, and efficacy of similar biologics, along with pre- and post-marketing regulatory requirements. Indian biologics are regulated under various acts and rules. CDSCO has made amendments to align with international standards, including acceptance of reference biologics from international bodies. Emphasis has been placed on post-marketing studies to further mitigate risks, with CDSCO mandating Phase IV studies within two years of marketing approval. Additionally, CDSCO introduced criteria for waiving confirmatory clinical studies based on PK/PD data and immunogenicity assessments. Indian companies are actively engaging in manufacturing biosimilars, particularly vaccines, monoclonal antibodies, insulin, and recombinant proteins, establishing India as a key player in the global biosimilars market[10,18].

Table 1: Example of the some Biosimilars approved in India		
Product Name	**Active Drug**	**Indicator**
Glaritus	Insulin glargine	Diabetes mellitus
Grafeel	Filgrastim	Neutropenia
Epofer	Epoetin alfa	Anemia

Future Prospects

The outlook for biosimilar adoption in India is promising, with several factors contributing to a positive future:

1. Patent Expirations: The expiration of patents for key biologics will create opportunities for Indian companies to introduce cost-effective biosimilars.

2. R&D Investment: Increasing investments in research and development by both public and private sectors will improve the capabilities of Indian firms to produce high-quality biosimilars.

3. Global Market Opportunities: Indian biosimilar manufacturers are also aiming at international markets, using their cost advantages and regulatory expertise to establish a presence in developed countries[3,19].

Conclusion:

Understanding the policies governing biosimilar adoption in India is essential for stakeholders throughout the healthcare sector. A combination of a supportive regulatory framework, proactive government initiatives, and the innovative drive of Indian pharmaceutical companies positions India as a significant player in the global biosimilar market. Addressing challenges related to development costs, awareness, and reimbursement will be crucial to fully harness the potential of biosimilars in enhancing healthcare outcomes and ensuring sustainable access to essential biologic therapies.

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