VACCINE MARKETS
OVERVIEW SESSION

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Program Officer, Vaccine Delivery – Market Dynamics

UNICEF SD Manufacturers Meeting
Copenhagen
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DRAFT
DISCUSSION TOPICS

- Our goals
- Our team
- Our priorities
- How we work together
- Programmatic impact (Polio example)
“By 2020, prevent 11 million deaths, 3.8 million disabilities, and 230 million illnesses, through high, equitable, sustainable vaccine coverage and supporting polio eradication”

- BMGF Vaccine Delivery Impact Goal
Vaccine Delivery

SHORT TERM STRATEGIC GOALS

1. Accelerating access to new vaccines
2. Supporting polio eradication
3. Ensuring sustainable, predictable financing for immunization
4. Improving the affordability and supply of vaccines
5. Improving the efficiency of data-driven vaccination systems
6. Increasing immunization coverage equity between and within countries
7. Improving immunization coverage for older children and adults
GLOBAL PROGRAMS WORK THROUGH A MATRIX

Global Health Functional Areas
- Discovery & Translational Sciences
- Vaccine Development
- Integrated Development
- Life Sciences Partnerships

Global Program Strategies
- HIV
- Malaria
- Enteric & Diarrheal Diseases
- Polio
- Family Planning
- Global Libraries
- Emergency Relief

Global Development Functional Areas
- Tuberculosis
- Pneumonia
- Neglected Infectious Diseases
- Agricultural Development
- Water, Sanitation & Hygiene
- Financial Services for the Poor
- Vaccine Delivery
- Integrated Delivery
- Multilateral Partnerships

Global Policy & Advocacy Geographies
- Financial Services for the Poor
- Water, Sanitation & Hygiene
- Family Planning
SEATTLE-BASED VACCINE DELIVERY TEAM STRUCTURE

Vaccine Delivery

- Vaccine Introduction & Market Dynamics
- Immunization Systems
- Country Programs & Partnerships
- Strategy, Planning, & Management
# OUR VACCINE DELIVERY PRIORITIES

<table>
<thead>
<tr>
<th>Vaccines</th>
<th>Immunization Systems</th>
<th>Countries</th>
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<tbody>
<tr>
<td>• Pneumococcus</td>
<td>• Supply chain</td>
<td>• Nigeria</td>
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<tr>
<td>• Rotavirus</td>
<td>• Data quality</td>
<td>• India</td>
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<tr>
<td>• Inactivated Polio</td>
<td>• Immunization financing</td>
<td>• Ethiopia</td>
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<tr>
<td>• Pentavalent</td>
<td>• Vaccination outside infant schedules</td>
<td>• Pakistan</td>
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<tr>
<td>• HPV</td>
<td>• Demand generation</td>
<td>• Democratic Republic of Congo</td>
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<tr>
<td>• Measles-Rubella</td>
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<td>• Chad</td>
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<td>• Meningitis</td>
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<td>• Uganda</td>
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<tr>
<td>• Cholera</td>
<td></td>
<td>• Other Polio high risk countries</td>
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<tr>
<td>• Maternal Immunization Pathogens</td>
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<tr>
<td>(e.g RSV, GBS)</td>
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<tr>
<td>• Japanese Encephalitis</td>
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<tr>
<td>• Malaria</td>
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<tr>
<td>• Typhoid Fever</td>
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<tr>
<td>• Dengue</td>
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OUR INVESTMENTS REFLECT OUR STRATEGIC PRIORITIES

- ~70% to GAVI
- Additional funds add to GAVI impact
- Focused on immunization systems, market dynamics, and new vaccine introduction
OUR MARKET DYNAMICS PRIORITIES

1. Affordable vaccines
   Make vaccine specific investments to ensure adequate supply and low prices.

2. Cross-cutting initiatives
   Invest in technology, platforms and information to find cross-vaccine solutions and bolster our thinking.

3. Partnerships
   Strengthen partnerships with other actors that contribute to meeting Gavi market goals.
BMGF, GAVI and UNICEF SD work in close cooperation across the vaccine market dynamics lifecycle, but with different roles and toolsets.

### HOW BMGF, GAVI AND UNICEF WORK TOGETHER

<table>
<thead>
<tr>
<th></th>
<th>Upstream</th>
<th>Pre-tender</th>
<th>Incentives</th>
<th>Procurement</th>
<th>Operations</th>
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<tbody>
<tr>
<td>BMGF</td>
<td>Product Innovation</td>
<td>Market Analytics</td>
<td>Alternative Investment Tools</td>
<td></td>
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<tr>
<td>GAVI</td>
<td>Market Analytics, Roadmaps</td>
<td>Other Market Incentives</td>
<td>PRG Process</td>
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<tr>
<td>UNICEF SD</td>
<td>Supplier Briefings</td>
<td>Tender Process</td>
<td>Supply Chain Operations</td>
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Manufacturers engage with multiple BMGF teams as well as numerous global health organizations.
FOUNDATION INVESTMENT TOOLS

BMGF tools span upstream and incentives opportunities and include grants, contract management and program-related investments.

**Upstream Tools** (Product Development)
- Product Development Funding, including PDPs
- Early Stage Equity Stakes
- Technical Assistance Grants

**Incentives Tools** (Product Delivery)
- Capacity Scale-up Loans and Contracts
- Supply Volume Guarantees
- Purchase Pre-payments

Key:
- Grants
- PRIs

Not Exhaustive
The foundation is focused on reliable supply of OPV for transmission interruption, IPV introduction needs, and novel products (including longer term IPV needs, new adjuvants and nOPVs)

**Reliable OPV Supply**
- A reliable supply of significant quantities of affordable OPV is essential to achieving polio eradication
- tOPV, bOPV and mOPV all have roles in SIAs, tOPV to bOPV switch, outbreak control, and vaccine stockpiling
- BMGF is working with manufacturers to ensure continued supply

**IPV Introduction Needs**
- A reliable supply of significant quantities of affordable IPV is also essential to achieving polio eradication
- Standalone full-dose Salk IPV will enable the tOPV to bOPV switch and bOPV cessation. Use of IPV in SIA campaigns and outbreak control demonstrates additional value of IPV in transmission interruption
- It is critical to work with countries, especially large ones, to understand their lead times and processes for ordering tOPV and to factor this into planning for the switch

**Novel Products**
- Long-term needs may include commercial-scale Sabin-based IPVs, dose-sparing IPVs, and IPV-containing combinations
- New adjuvants (e.g. DMLT) may have enhanced mucosal immunity impact
- Work also taking place on novel genetically stable OPVs, i.e. without VAPP or VDPV risk
**BMGF POLIO INVESTMENTS**

The foundation is currently working with a broad portfolio of MNC and DCM partners, consistent with these polio priorities

<table>
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<tr>
<th>Reliable OPV Supply</th>
<th>IPV Introduction Needs</th>
<th>Novel Products</th>
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<tbody>
<tr>
<td>▪ Investment to help bring an additional OPV bulk supplier to market</td>
<td>▪ Enablement to one large-scale supplier to provide standalone Salk IPV in a 10-dose vial at new market low</td>
<td>▪ Collaborations with academics on alum-adjuvants</td>
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</table>
| ▪ Support to additional OPV suppliers on regulatory and other issues | ▪ Continued openness to discuss offers to support reliable supply of affordable IPV to UNICEF | ▪ Collaboration with multiple different suppliers on:  
  - Alum adjuvants  
  - Novel adjuvants  
  - Sabin-based IPVs  
  - Combination IPVs  
  - High-yield platforms  
  - nOPVs |  
| ▪ Offer in the most recent OPV tender to support UNICEF firm commitments | | ▪ Continued openness to discuss offers to support supply of novel products to UNICEF |
| ▪ Working with suppliers to understand longer term OPV demand (based on historical increases to WHO forecasts) | | |
| ▪ Continued openness to discuss offers to support reliable supply of affordable OPV to UNICEF | | |
“A world in which all individuals and communities enjoy lives free from vaccine-preventable diseases”

- Global Vaccine Action Plan
“It takes a village to raise a child.” - African proverb

THANK YOU

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BACKUP
Market Dynamics supports PST needs by leading vaccine investment teams and collaborating with internal and external partners.