Gavi
Current Initiatives

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Agenda

- **Supply and Procurement Strategy - strategic priorities**
- **Manufacturer engagement and information sharing**
- **Looking ahead – Vaccine Investment Strategy 2018**

In 2016-20, three strategic priorities drive a more ambitious agenda

Long-term view

Taking a long-term view of markets

Innovation

Driving innovation to better meet country needs

Healthy markets

Delivering on healthy markets

Externalities of market shaping

Long-term view

Monitor the unintended consequences of Gavi market shaping activities in Gavi and non-Gavi countries

Monitor the positive and negative externalities of its market shaping activities on the market place, i.e. on **manufacturers, Gavi and non-Gavi countries and partners,** including the weighting of risks and consequences against the potential benefits.

Gavi will also **work with manufacturers** to determine which information provide insight into the **impact of market shaping on innovation and research and development**.

Status

- Public consultation on externalities of market shaping concluded
- External consultancy retained
- Identification and prioritisation of externalities ongoing

Support for informed, country-owned decisions

Long-term view

Under the strategic goal on sustainability, Gavi will support countries towards successful transition

- Support country governments to make **well-informed introduction and product decisions** by sharing with them the **full set of trade-offs to consider** in evaluating the options.

Support countries by **sharing key information, tools, methodologies** that can help **strengthen the forecasting and product strategy development capabilities**

Support **clarification of the roles of partners in supporting continued country transition post Gavi support**,

Status

- Background and in-country research to identify country needs
- Draft stakeholder plan to support product decision-making and procurement by countries

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Support product innovation to better meet country needs

Innovation

Accelerating product innovation <u>to better meet country programmatic needs and improve coverage and equity</u>

"Product innovation' refers to completely new products or to adaptations to existing products that provide measurable financial or programmatic benefits

Develop **common principles** to make the assumptions underpinning the value proposition explicit for **long-term product innovations**

Convene a platform to articulate a **clear and aligned perspective on how and what to prioritise. Communicate these priorities** in a non-binding manner

Understand **countries' needs** by leveraging countries' and technical partners' field experience to consider financial and non-financial impact of innovations

Status

- Common principles developing in TSE (next slides)
- Draft proposal for a platform complete

Total Systems Effectiveness (TSE) is an attribute of a healthy market

Healthy markets

Innovation

Total System Effectiveness	**Long Term Competition**	**Product Innovation**
Buffer Capacity	**Individual Supplier Risk**	**NRA Risk**
Meet Country Preferences		
Supply Meets Demand		
Inadequate Supply		

The highest level achieves positive system features such as the effect of the market on immunization system effectiveness, long term competition and product innovation

A more healthy market has additional supply security attributes

A healthy market meets country preferences for specific vaccine characteristics

The minimum of a healthy market is supply meets demand

Markets without adequate supply are not healthy

Healthy markets

Total Systems Effectiveness (TSE) initiative

- The **Total Systems Effectiveness (TSE)** initiative is a **multi-stakeholder effort** (WHO, UNICEF, Gavi, PATH, CHAI, JSI & Gates), initiated in March 2016, but really kicked off in March 2017

- **More to follow:** Internal consultations are organised within partners as part of the socialization of the concept

The Issues

① The innovation conundrum

- The supply of **innovations** is **not always met with country level demand**

② The decision making bias

- **Country decisions** to introduce an innovation is **often guided by purchase price** without understanding:
  - Potential savings on service delivery costs, or from a safety perspective, or wastage
  - Benefits in terms of coverage and health impact that could be achieved

③ The coverage equity plateau

- Countries often use a single vaccine nationwide when **using a mix of presentations adapted to different settings and delivery strategies could help break the coverage plateau**

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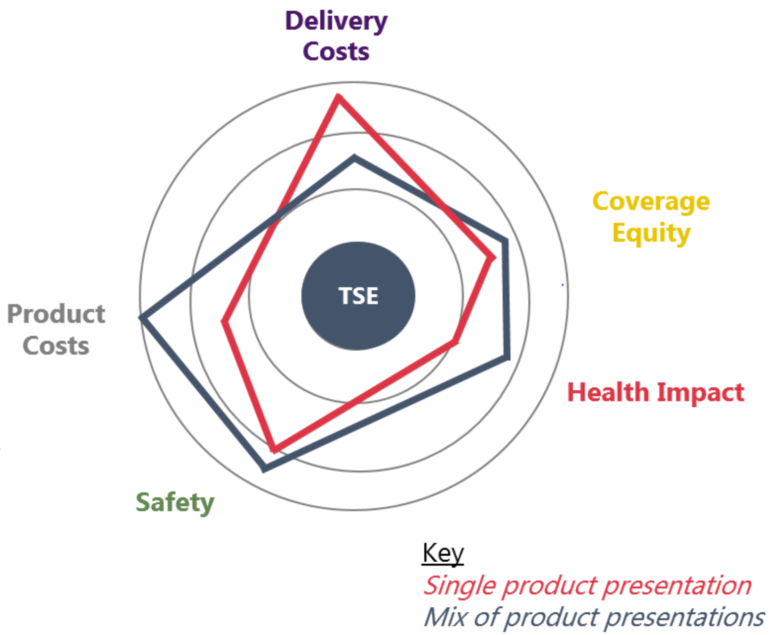
Healthy markets

TSE is an analytical 'end-to-end' framework

The Solution

1. By helping to understand the **trade-off** across a core set of components and make the **value proposition of new innovations (and assumptions) explicit** and **much earlier** in the vaccine and technology product development process
2. By paving the way for a **future-state** where countries:
   - Can comprehensively evaluate the **tradeoffs** of each **beyond just the purchase price**
   - Can choose **multiple product presentations** for different programmatic adaptations
   - Can apply **"Systems" thinking** to product decision-making with the context of coverage and equity improvements



Industry engagement moving forward

Gavi will engage with industry in a deliberate and partnership-minded way with sensitivity to the different business needs of individual manufacturers and mutual transparency.

- **Give visibility over longer time horizons** for product development and adapting product strategies where needed to recognise the varying constraints of individual manufacturers
- **Communicate priorities and opportunities** for vaccines and other immunisation products as early as is feasible through the VIS and the product roadmaps
- **Coordinate and align their communications** to ensure that market-shaping goals are clearly articulated ('one voice')
- **Engage in regular dialogue**, both formal and informal
- **Convene informal bilateral meetings** (mirrored at CEO level when possible) to review individual and joint business priorities

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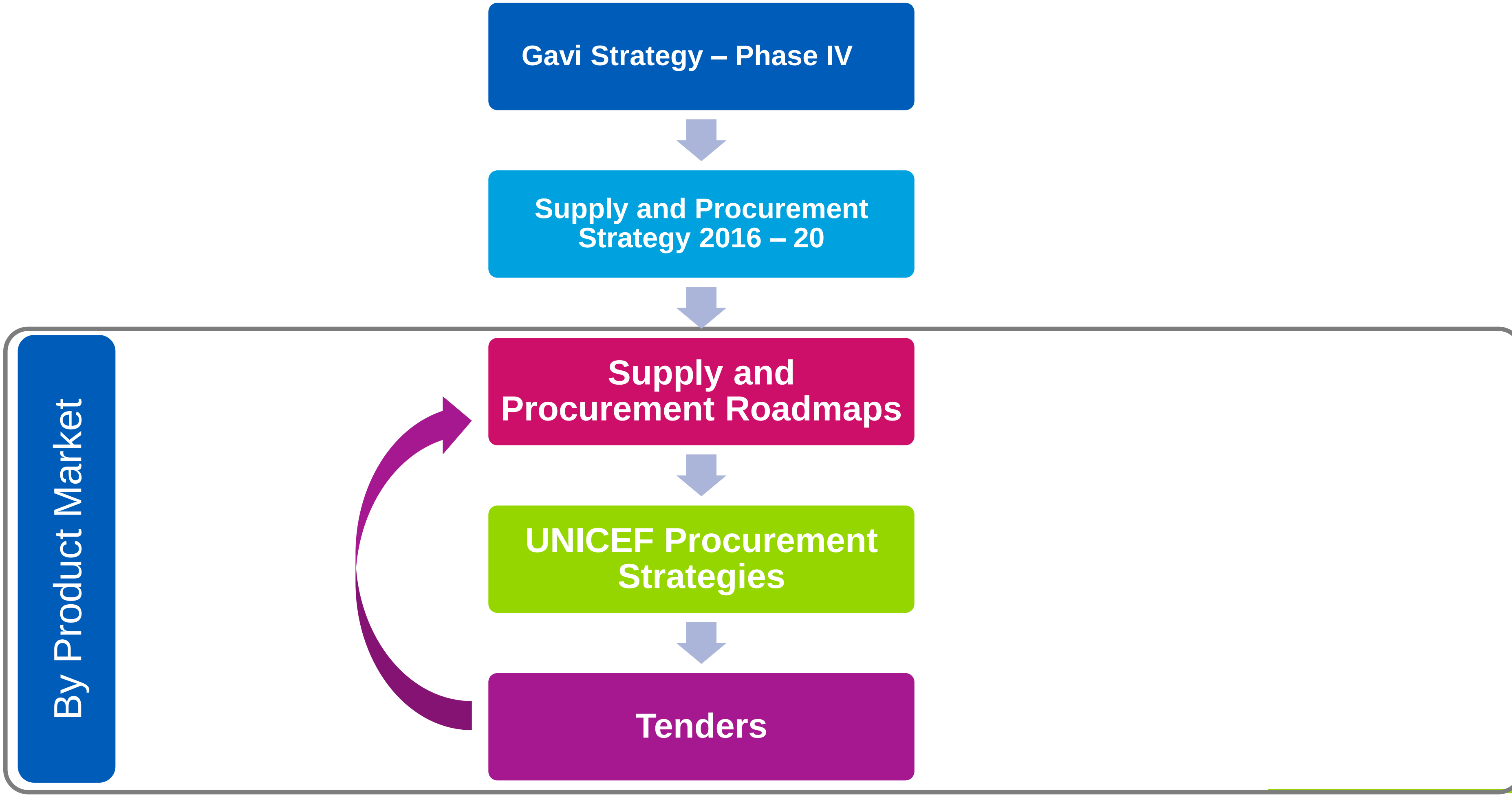
Each vaccine market has specific attributes and needs – strategies are aligned to individual markets



KEY

__**Year**__: Current roadmap
Year: Update ongoing
Year: Update planned

Supply and procurement roadmap availability

Roadmaps	First version	Second version
HPV	__**2012**__	*2017*
Pentavalent	**2013**	__**2016**__
Yellow Fever	**2013**	__**2016**__
Rotavirus	**2013**	__**2016**__
IPV	__**2013**__	*2017*
Measles-Rubella	__**2014**__	*2017*
Pneumococcal	**2014**	__**2017**__
Japanese encephalitis	**2014**	__**2016**__
Meningococcal A	__**2015**__	2017
Meningococcal Stockpile	2017	
Cholera	__**2014**__	2018
Typhoid	TBC	

Available at: http://www.gavi.org/about/market-shaping/supply-and-procurement-roadmaps//

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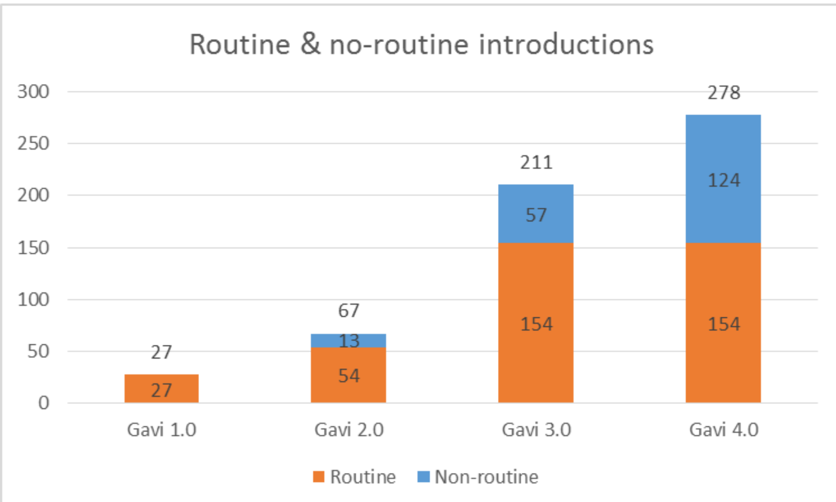
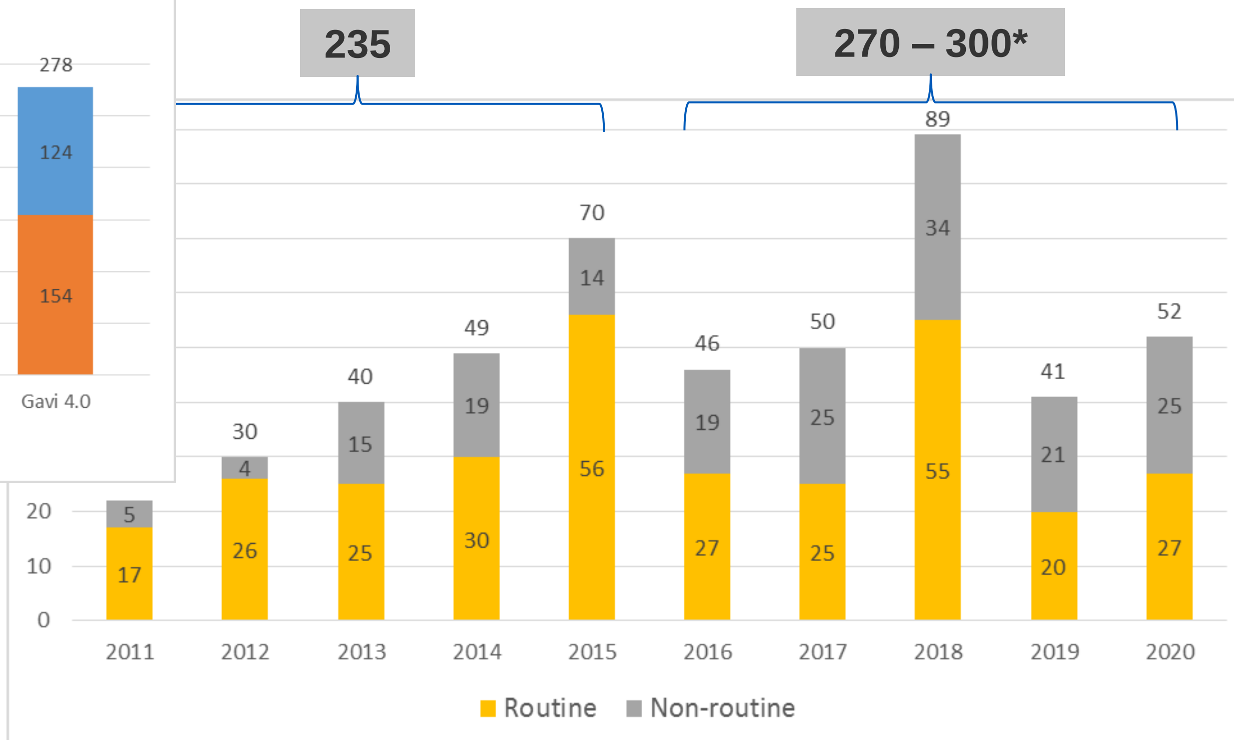
In 2016- 20 more introductions are planned than during the previous period

- ***The new Measles strategy means Gavi funds routine as well as M "follow up" programs. Gavi now also funds routine MenA and JE routine.***

- ***HPV Multi-age-cohort programs are not included in these graphs***





** The 270 number of introductions includes the count of follow up activities, the upper range of ~300 includes the count of HPV multi-age-cohorts programs, but m-a-c- is not reflected in the chart*

2 Strategic demand forecasts available

- "BASE" forecast, updated annually in Dec/January
  - Reflects Gavi board approved budget, translated to doses for 10 years
  - Simple breakdowns to help describe certainty
  - Included country co-financed doses
  - Reflects a supply constrained view (because this is the budget)

- STRATEGIC Demand Scenarios, update schedule posted
  - Starts with the last budget forecast as a key reference point
  - Emphasizes scenarios and ranges; not constrained by supply
  - Outputs should inform targeted decision(s), inform subsequent Gavi budget forecasts; and are shared with partners and industry

Annual publication of demand aligned with budget

- Main output is a table; short cover note containing high-level context

Forecasted volume, doses, millions

FICTITIOUS FIGURES

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Pentavalent	130	133	135	138	141	144	146	149	152	155
PCV	117	119	122	124	127	129	132	134	137	140
Rota	94	95	97	99	101	103	105	108	110	112
HPV	75	76	78	79	81	83	84	86	88	89
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Notes: figure includes doses funded by Gavi, co-financed doses funded by countries, and doses that transitioned countries would be fully self-financing. [A few other key notes - e.g. India is included in vax x but not in vax y.]

- Important disaggregation of volume, e.g.

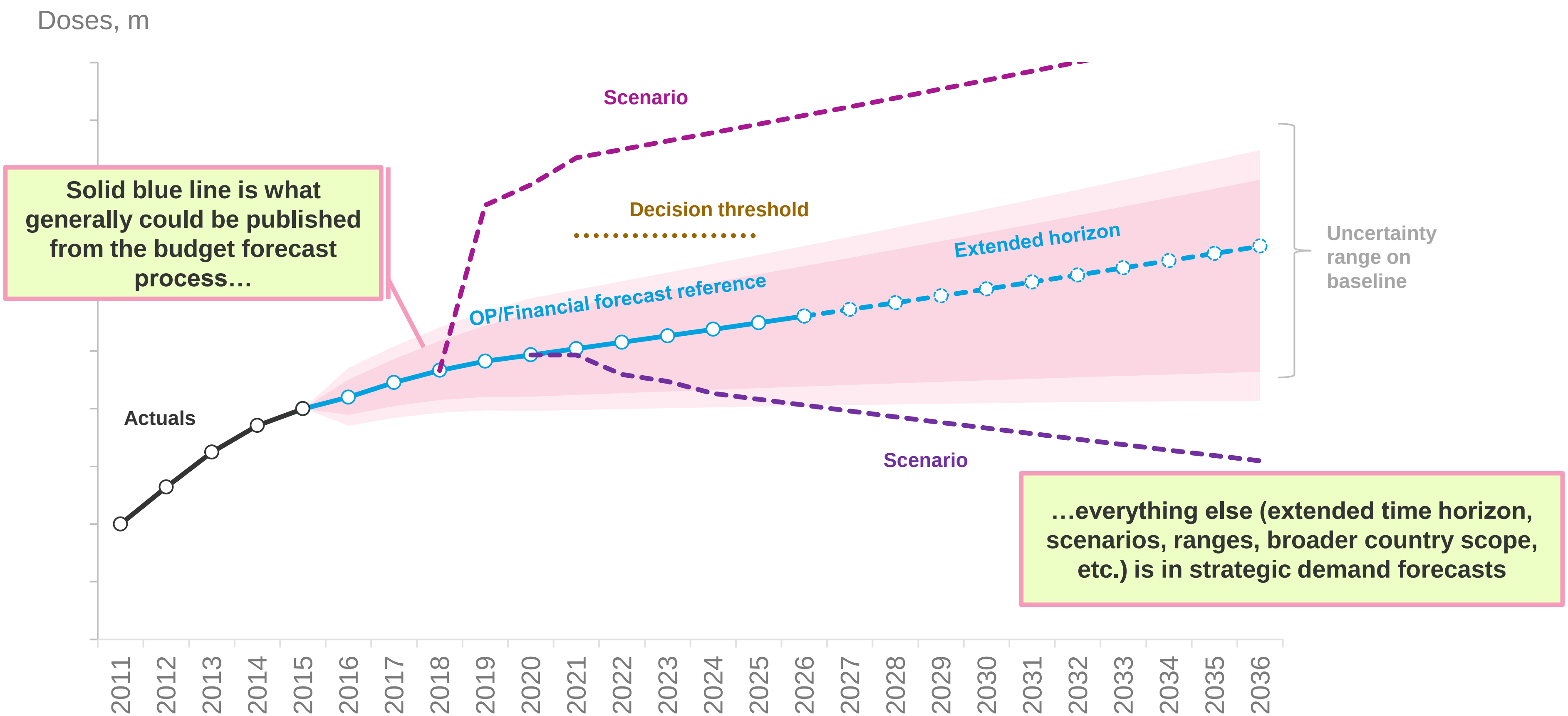
Forecasted volume, doses, millions

FICTITIOUS FIGURES

Rota	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Introduced	94	95	97	99	101	103	105	108	110	112
Approved, yet to introduce	84	86	88	89	91	93	95	97	99	101
Yet to apply	67	69	70	72	73	74	76	77	79	81

- Does not have the detailed context, assumptions, scenarios, graphing

Strategic demand describing scenarios; greater detail

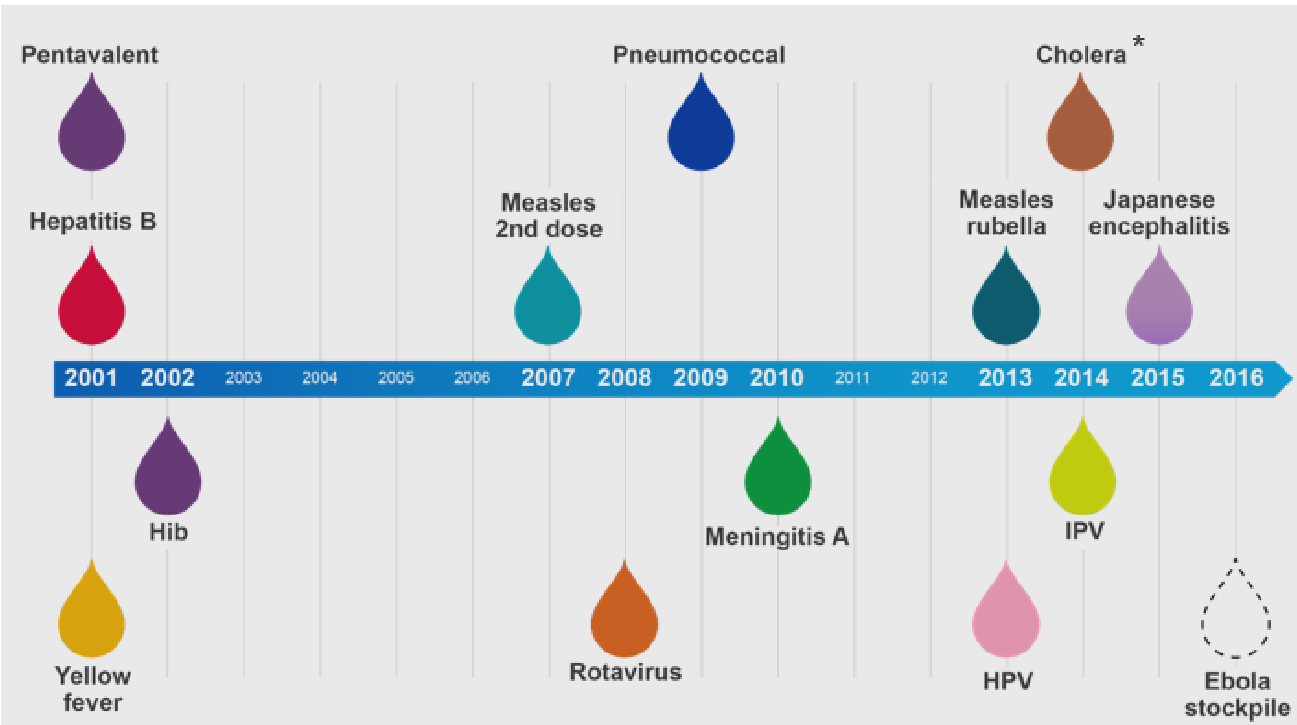


Market Shaping tools available for public use on Gavi website

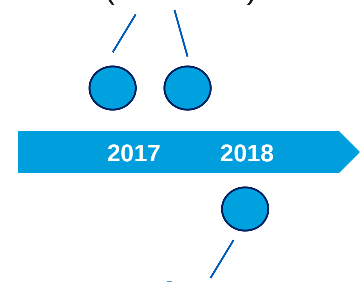
http://www.gavi.org/about/market-shaping/

- Supply and Procurement Strategy
- Gavi Base Demand Forecast
- Public roadmap summaries

VACCINE INVESTMENT STRATEGY - 2018



VIS Phase 1:
Board decision on new decision framework (Nov 2017). Analysis of WHO landscape vaccines for Board decision on shortlist (Jun 2018).



VIS Phase 2:
In-depth analysis of shortlisted vaccines and Dec 2018 Board decision

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Preliminary overview of candidates in VIS 2018

Disease Category	Candidate Vaccine	Likely Vaccination Strategy	Currently supported by Gavi?	Licensure Status
Planned Preventative Immunisation for Endemic Diseases	**Diphtheria**	*Routine Diphtheria-containing Booster*	✓	Licensed
	Tetanus	*Routine Tetanus Toxoid-containing Booster*	✓	Licensed
	Pertussis	*Routine Pertussis-containing Booster*	✓	Licensed
	Hepatitis B	*Birth Dose*	✓	Licensed
	Oral cholera vaccine	*Preventive Campaigns in Endemic Settings*	✓	Licensed
	Meningitis C, Y, W, X	*Multivalent Conjugate Vaccines in Routine & Campaigns*	✓	Licensed
	Group B streptococcus	*Routine Maternal Immunisation*	✘	Under Development (Phase 2)
	Hepatitis E	*Campaigns in Humanitarian Settings*	✘	Licensed
	Hepatitis A	*Routine Immunisation*	✘	Licensed
	Dengue	*Routine Immunisation*	✘	Licensed
	Influenza	*Routine Maternal Immunisation*	✘	Licensed
	RSV	*Routine Maternal Immunisation*	✘	Under Development (Phase 3)
	RSV mAb	*Prophylactic Neonatal Use in High-risk Populations*	✘	Licensed
	Rabies	*Post-exposure Prophylaxis*	✘	Licensed
	Rabies Ig/mAb	*Post-exposure Prophylaxis*	✘	Licensed (mAb in development)
	Malaria (RTS,S)	*Implementation Pilot Phase 2; Future Routine Use*	✘	Licensed (Implementation pilots)
	PCV	*Catch-up campaigns for 2-4 Additional Cohorts*	✓	Licensed
Public Health Risk Reduction	**Chikungunya**	*Outbreak Response*	✘	Under Development (Phase 2)
	Zika virus	*Outbreak Response*	✘	Under Development (Phase 2)
	Ebola	*Preventive Immunisation of Healthcare Workers*	✓	Under Development (Phase 3)
IPV	**IPV post-eradication**	*Routine Immunisation*	✓	Licensed
Flu	**Influenza**	*Pandemic Response*	✘	Licensed

* Further analyses and information might shift this list over the course of the next few months

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