

# Access to Medicine Foundation

## 2017 Access to Vaccines Index

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8 November 2017, Geneva

# The Access to Medicine Foundation

access to  
medicine  
FOUNDATION

- Research, guide and incentivise pharmaceutical companies to improve access to medicine
- Independent, non-profit organisation
- Multi-stakeholder approach



Ministry of Foreign Affairs  
of the Netherlands



BILL & MELINDA  
GATES *foundation*



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# Our model for change

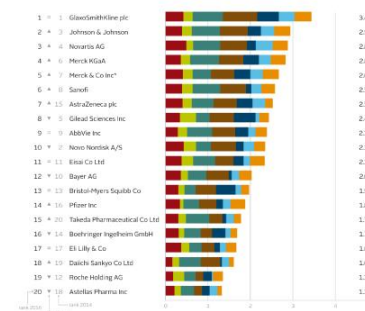
## Build consensus

on what to expect from the industry and where incentives and disincentives exist.



## Stimulate a “race to do well”

in key access-to-medicine areas, by creating competition on targets and topics.



## Diffuse best practices

to share information and new insights into the best approaches for driving change.

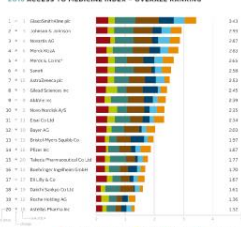


# What we do

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## ACCESS TO MEDICINE INDEX

### 2016 ACCESS TO MEDICINE INDEX - OVERALL RANKING



## AMR BENCHMARK



### A RESEARCH & DEVELOPMENT

#### WHAT THIS AREA COVERS

The Benchmark will capture companies' R&D activities targeting effective diseases. It will map R&D and reward efforts to target pathogens whose distribution and drug resistance makes them a priority target for R&D. It will also recognise companies that plan for the stewardship and accessibility of new products that target priority pathogens, following market entry.

### B MANUFACTURING & PRODUCTION

#### WHAT THIS AREA COVERS

The Benchmark will compare company strategies for limiting the impact of antibiotic manufacturing on resistance. It will assess how companies take antibiotic discharge into account in their manufacturing and environmental risk-management strategies. It will also ask how companies maintain the quality of their antibiotics.

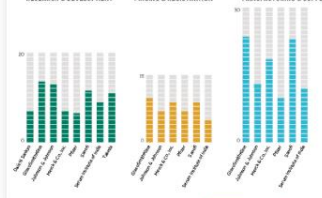
### C APPROPRIATE ACCESS & STEWARDSHIP

#### WHAT THIS AREA COVERS

The Benchmark will assess companies' access strategies for antimicrobial medicines in low- and middle-income countries, alongside their global stewardship strategies for antibiotics. The aim is to understand how companies approach these two challenges, including whether and how each company integrates these approaches.

## ACCESS TO VACCINES INDEX

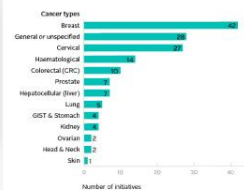
### RESEARCH & DEVELOPMENT PRICING & REGISTRATION MANUFACTURING & SUPPLY



## THEMATIC STUDIES

### Improving access to cancer care

A first analysis of pharmaceutical company actions in low and middle income countries



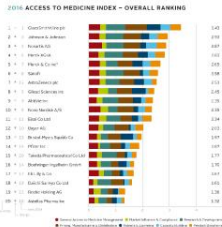
## ADVANCING THE DEBATE





# Our tools in action

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# 2017 Access to Vaccines Index

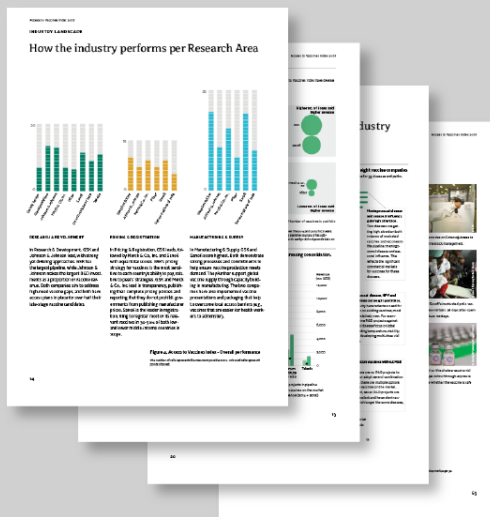
# Why an Access to Vaccines Index?

- Vaccines are one of the most successful and cost-effective ways to protect billions of people from disease
- Vaccine companies are a key link in the chain to each successful vaccination
- The first public benchmark mapping industry action
- It stimulates vaccine companies to improve their practices
- It helps uncover where more action is needed and where companies face barriers to greater action



# What's in the report

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## INDUSTRY LANDSCAPE

3

## KEY FINDINGS

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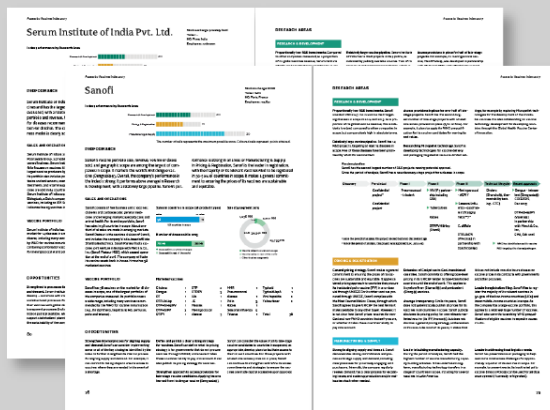
## CROSS-CUTTING ANALYSES

3

## RESEARCH AREA ANALYSES

8

## COMPANY REPORT CARDS



### Cross-Cutting Analyses

The 2017 Access to Vaccines Index has mapped how vaccine companies are responding to global calls to improve immunisation coverage. The companies approach access to vaccines in differing ways, which are generally linked to their diverse pipelines, portfolios, resources and sales.

The Index has carried out two analyses that cut across the three Research Areas covered by the Index. The first of these cross-cutting analyses looks at how companies are exploring the first milestone and deeper waters the second maps company efforts to tackle emerging infectious diseases such as the Ebola virus and Zika virus.





# What we measure

## A RESEARCH & DEVELOPMENT



- A.1 R&D Investments
- A.2 R&D Projects - vaccines
- A.3 R&D Projects - technologies
- A.4 Facilitating access

## B PRICING & REGISTRATION



- B.1 Pricing strategy
- B.2 Pricing strategy transparency
- B.3 Registration

## C MANUFACTURING & SUPPLY



- C.1 Overcoming local barriers
- C.2 Ensuring rational use
- C.3 Responding to shortages
- C.4 Collaboration to align supply & demand
- C.5 Supporting vaccine security
- C.6 Increasing global manufacturing capacity

## SCOPES

**PREVENTIVE VACCINES** – Designed to protect against future disease

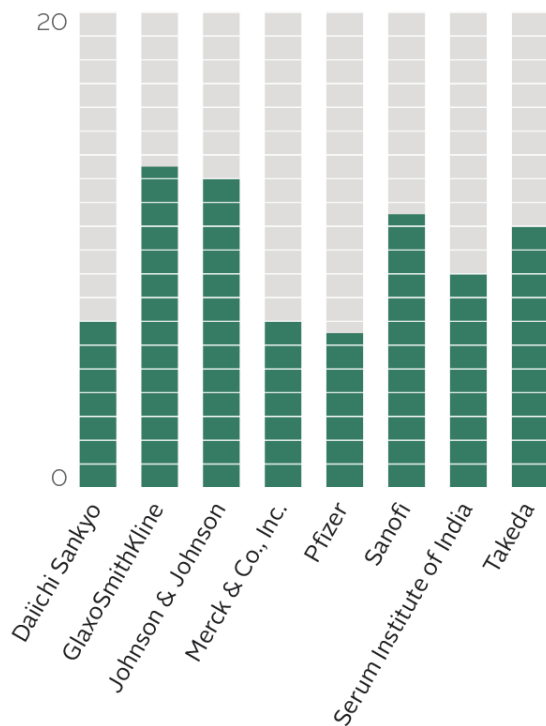
**8 COMPANIES** – With large vaccine business; with relevant high-need vaccines on market and/or in pipeline

**69 DISEASES** – WHO recommended for routine immunisation or R&D; stakeholder recommendations

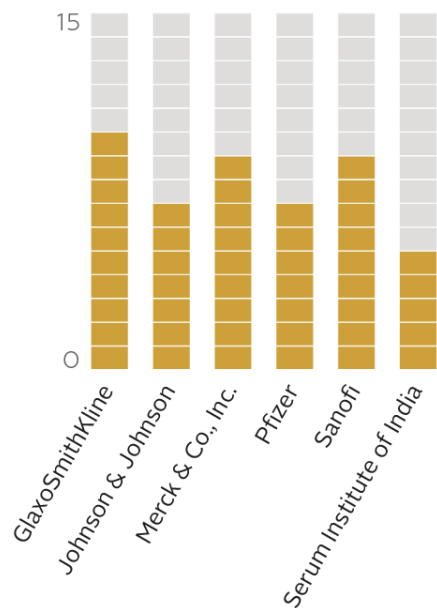
**107 LOW AND MIDDLE-INCOME COUNTRIES**

# Company performance

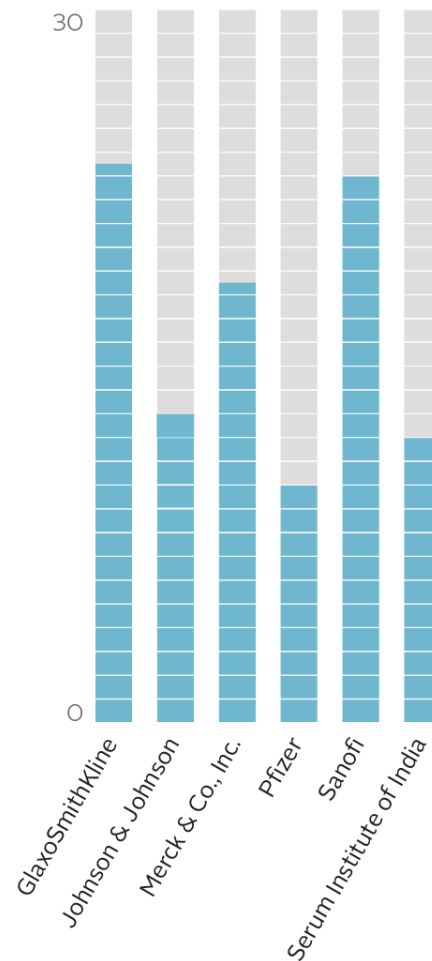
## RESEARCH & DEVELOPMENT



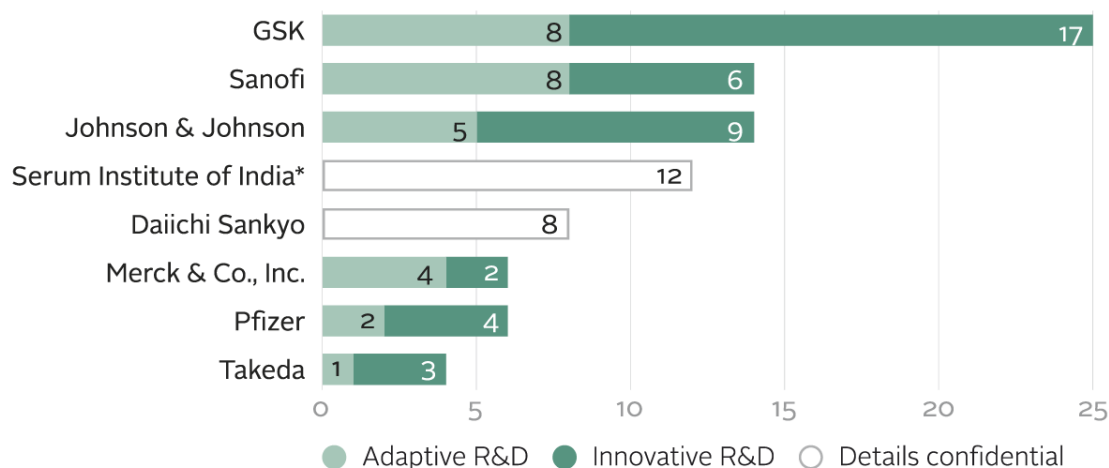
## PRICING & REGISTRATION



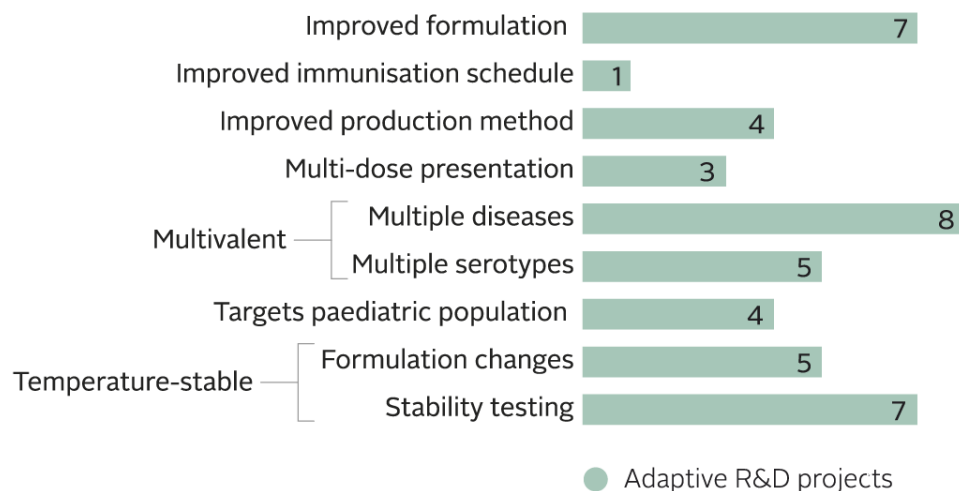
## MANUFACTURING & SUPPLY



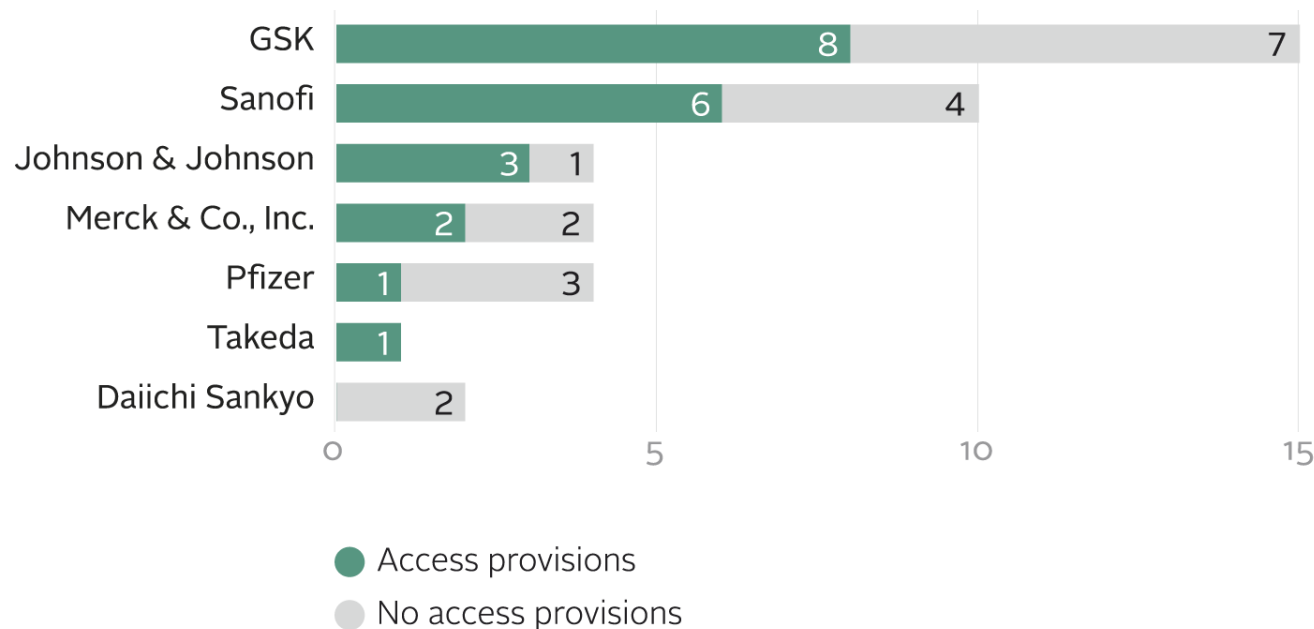
# Adaptations to existing vaccines account for half of vaccine R&D projects



## Companies are working toward a wide variety of vaccine adaptations



# Companies have access provisions in place for over half of vaccines in late-stage development



# Factors considered when setting vaccine prices

Type of factor	Factor	GSK	Johnson & Johnson	Merck & Co., Inc.	Pfizer	Sanofi	Serum Institute of India
Country feature	Gavi status (eligible, transitioning)	●	●	●	●	●	●
	GNI per capita, for at least some countries	●	●		●	●	
	Humanitarian emergency discount	●			●		
	Fiscal capacity and health spending			●			
	Mechanisms & policies for procuring vaccines			●			
	Competitive environment					●	
	Existence of distinct distribution networks (e.g. public/private)					●	
Extent of government's commitment	Target population coverage	●		●			
	Covering entire birth cohort				●		
	Vaccinating catch-up cohorts	●					
	Volume to be purchased	●					
	Duration of contract	●					
Value of vaccine	Public health value to healthcare system			●	●		
	Scientific innovation vaccine represents				●		
Need for vaccine	Public health need			●			
	Disease burden & which population segments are affected by the disease					●	
Required investment	In clinical development programmes				●		
	In manufacturing facilities & workforce				●		

# Diverse approaches to aligning supply with demand

Key elements for preventing/ responding to shortages	GSK	Johnson & Johnson	Merck & Co., Inc.	Pfizer	Sanofi	Serum Institute of India
Commitment to ensure access in case of shortages	●	●	●			
Regular and timely supply-and-demand review process	●	●	●	●	●	
Clear process for escalating and acting on identified issues	●				●	
Reserve stocks (not including externally managed stockpiles)		●	●	●		
Processes for scaling up production		●		●	●	●
Processes for re-allocating stocks	●				●	
Donations or affordability measures in emergency situations	●					
Consideration of other suppliers in a market when making decisions	●					

## Commitments to continuing supply of vaccines

Commitment to stay in vaccine markets where needed		●	●			●
Commitment to communicate plans to reduce supply externally	●		●		●	

● Company has a clear commitment/process



# Notable initiatives

- The Meningitis Vaccine Project
  - WHO, PATH, Serum Institute of India and African public health
- The most advanced malaria vaccine candidate
  - GSK, PATH Malaria Vaccine Initiative, supported by funding from the Bill & Melinda Gates Foundation
- The Advance Market Commitment (AMC) for pneumococcal conjugate vaccines

# Discussion

## Opportunities for action

# Opportunities

- Focus on addressing priority health needs (emerging infections, AMR)
- Ensure rapid access to successful innovations
  - Plan for access early, including consideration of vaccine attributes as well as manufacturing, pricing, supply
- Identify and address barriers to scaling up implementation of important new vaccines
- Incentivise greater stakeholder engagement, including local communities







# Thank you

[www.accesstomedicinefoundation.org](http://www.accesstomedicinefoundation.org)

[www.accesstovaccinesindex.org](http://www.accesstovaccinesindex.org)