

HEALTHY MARKETS FRAMEWORK



Photo courtesy of Peter Illiciev

Developed jointly by

BILL & MELINDA
GATES foundation



PUBLIC OVERVIEW

Introduction to the Healthy Markets Framework

Gavi, the Vaccine Alliance, developed the Healthy Markets Framework (HMF) as a tool to support market shaping.



To have **a common way of thinking about market health** for vaccines important to the countries we serve



To better communicate how we assess individual vaccine markets and their ability to best meet the needs of Gavi countries



To improve how we **analyse potential trade-offs** between different market attributes

The HMF is a framework for assessing the attributes of a 'healthy market'

- ◆ The HMF was jointly developed by Gavi, UNICEF and the Gates Foundation
- ◆ “Market” refers to the supply of vaccines for prevention of a specific disease in countries supported by Gavi, the Vaccine Alliance
- ◆ The HMF is used to assess the current state and to articulate the desired future state of a market
- ◆ All HMF attributes are considered in every market and then are adapted to specific markets
- ◆ Costs/prices are assessed by market attribute. The costs (if any) of achieving higher levels of market health are assessed
- ◆ The values ascribed to specific HMF attributes are more transparent, and are used to judge the relative strengths of different interventions

Building blocks make up the framework



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

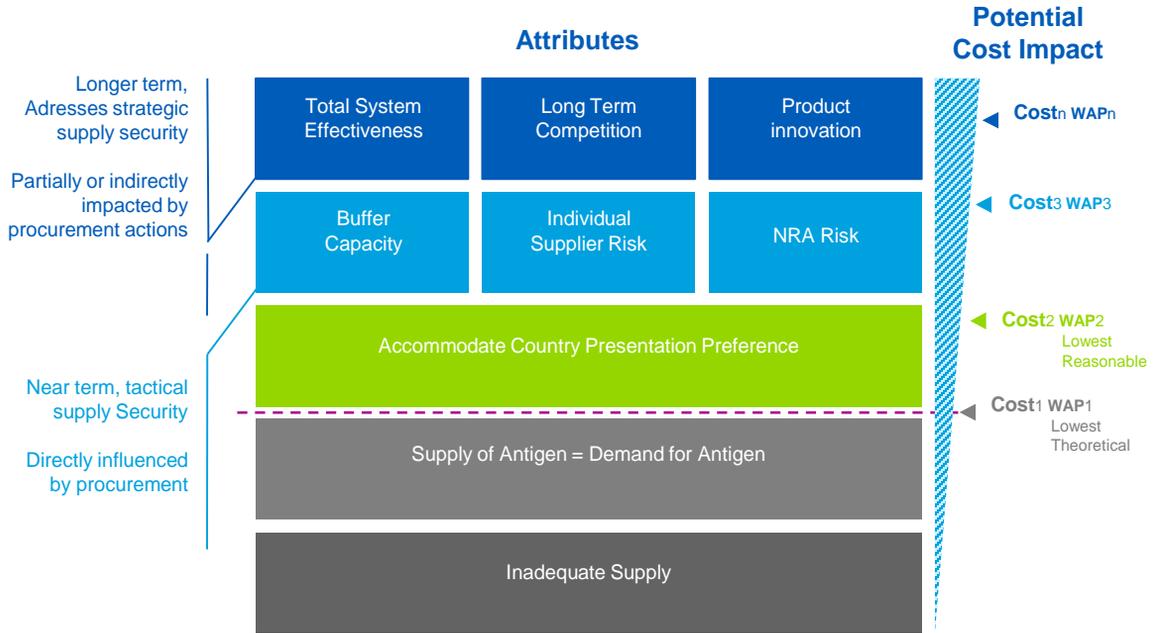
A more healthy market has additional supply security attributes

A healthy market meets country preferences for specific vaccine characteristics

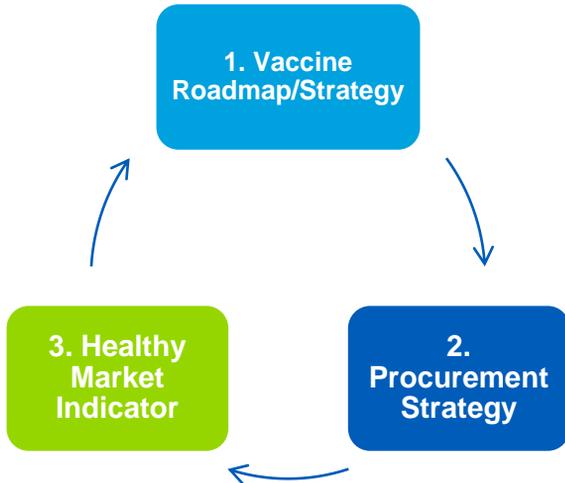
The minimum of a healthy market is supply meets demand

Markets without adequate supply are not healthy

Healthy markets framework



Application to vaccine markets

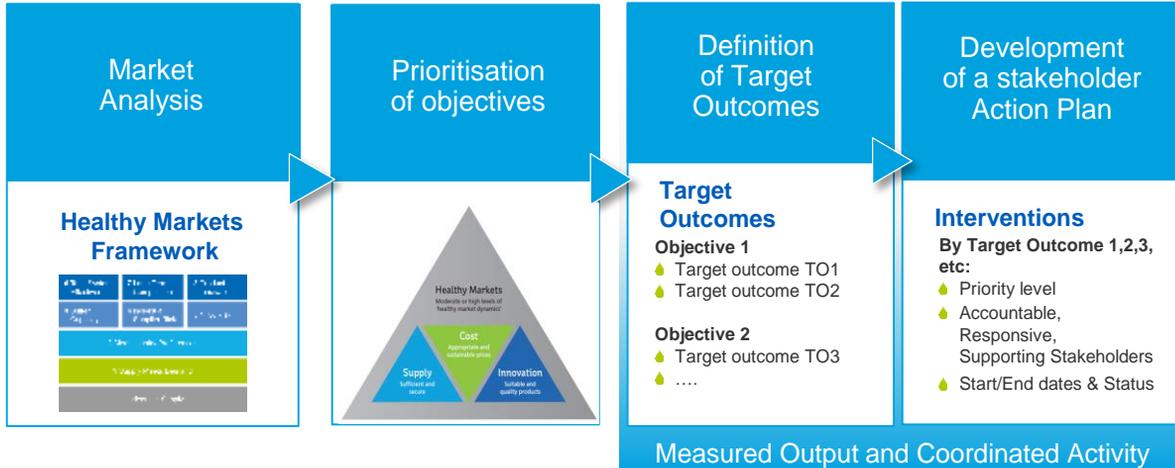


1. The HMF is used to establish market shaping strategies for each vaccine
2. The HMF analytic framework is used in evaluating procurement decisions
3. The HMF is used to evaluate progress on the Market Shaping goal (SG4) 2016 - 20

Roadmaps set targets & ensure coordination

Roadmaps:

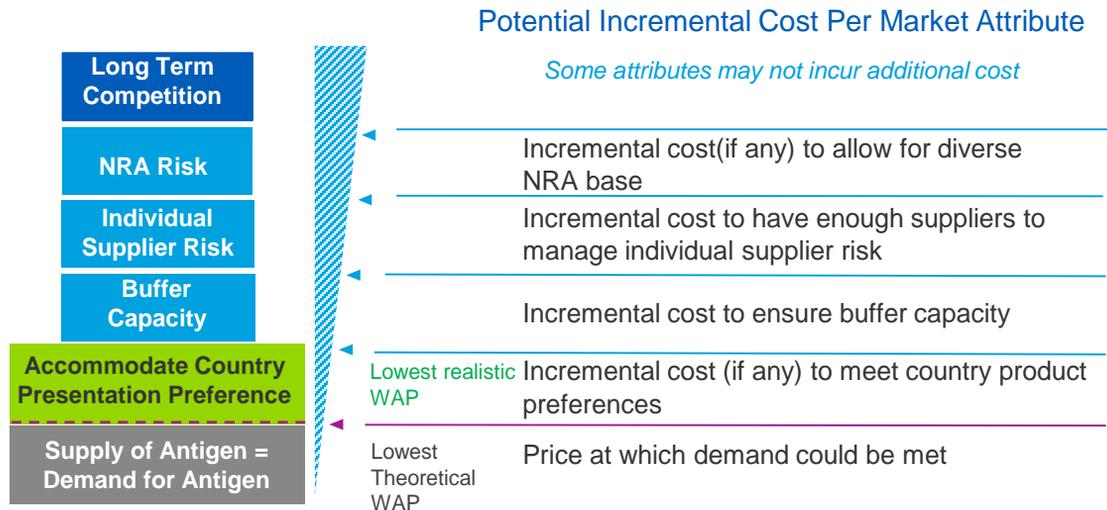
Short to long term view of how the market should evolve for particular vaccines and identification of mechanisms to influence the supply and price environment and achieve set targets



Note: Roadmap documents exist in three versions: Restricted and Highly Restricted 'full' versions (highly confidential) and a 'Public Summary' version available via <http://www.gavi.org/>

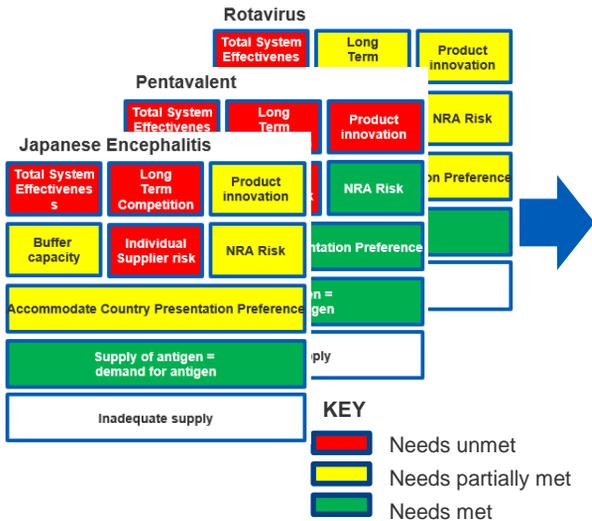
2. Example of application to procurement

Tender decision analyses should calculate the cost of improving each additional attribute



Illustrative Example

3. Indicator analysis and reporting



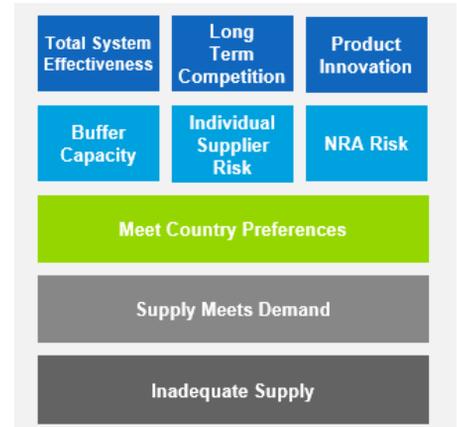
Vaccines	Inadequate supply	Low HMD	Moderate HMD	High HMD	Moderate or high HMD
Cholera					
HPV					
IPV					
Mening.					
MR					
Measles					
Pentavalent					
PCV					
Rotavirus					
Yellow Fever					
JE					
Total					

Goal level indicator

Illustrative examples

Limitations of the HMF

- ◆ HMF focuses on market considerations for Gavi supported countries, and may not apply to other markets
- ◆ Market health is viewed from the perspective of Gavi and the countries it represents; manufacturers may have a different perspective
- ◆ HMF approaches each vaccine market separately– it does not consider the effects of one market on another
- ◆ The determination of how much achieving each attribute is worth requires judgement.
- ◆ The attribute of Total Systems Effectiveness is not currently well understood but will be a focus area to strengthen.
- ◆ The HMF is being used in practice in 2016 – it will evolve !



Looking forward



The framework is being **rolled out at multiple levels** of the Gavi Alliance to **create consistency** between each level of implementation, and to **inform** product roadmaps, procurement strategy and award allocations



We will continue to **evolve and refine** the HMF with **continued use and experience**



We welcome **feedback** on all aspects of the HMF

THANK YOU



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