



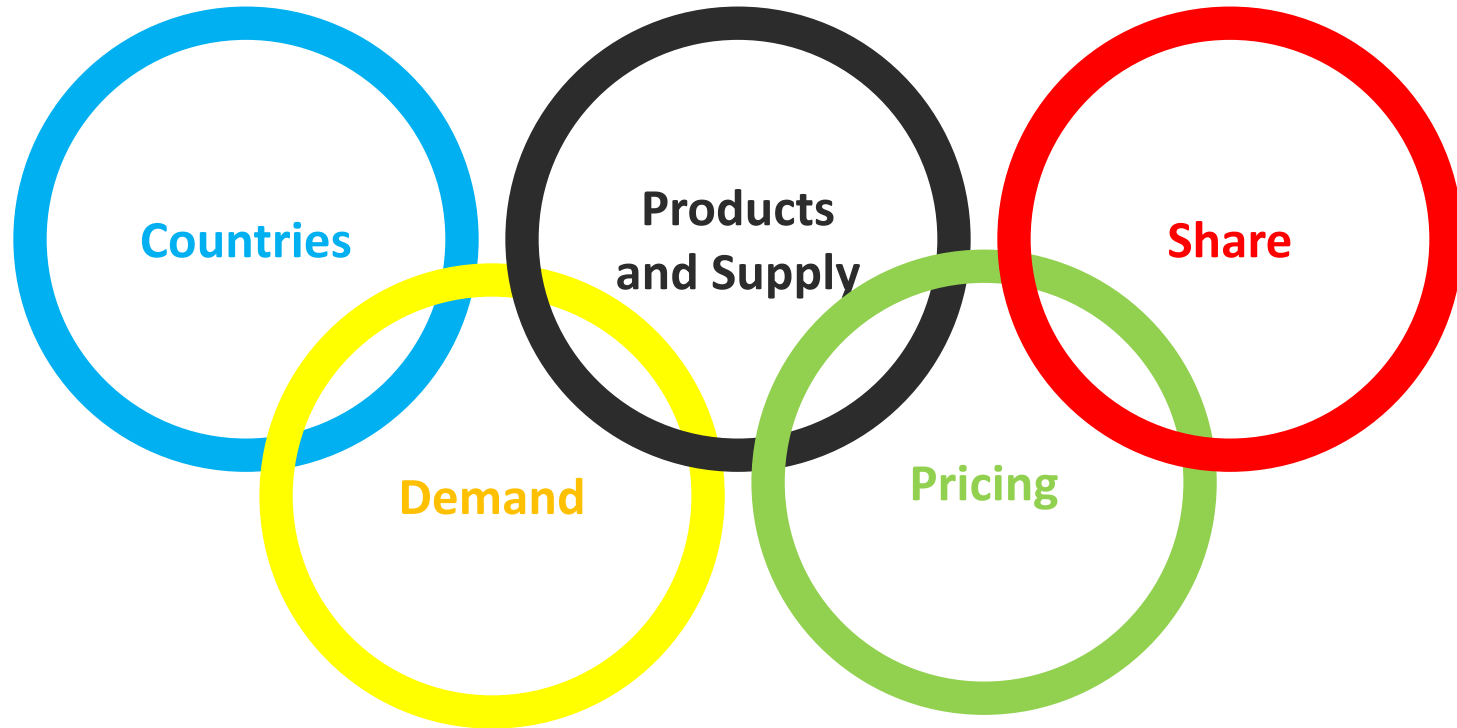
# Global Vaccine Market Model

Overview of Asset

Version 5.3  
March 31, 2021

# The Global Vaccine Market Model (GVMM)

GVMM is a data-sharing collaboration using public information from the Gates Foundation, CDC, CHAI, PAHO, PATH, UNICEF, WHO and other sources that is managed and curated by Linksbridge, SPC



# Scope

All vaccines in all countries 2000-2035, per markets shown below

	Licensed	Candidate	Non-adult	Adult	Public	Private	Traveler	Military	Hospital
Demand	●	●	●	●	●				
Supply	●	●	●	●	●	●	●	●	●
Pricing	●	●	●	●	●	●	●	●	●
Share	●		●	●	●				
Value	●	●	●	●	●	●	●	●	●
Private Markets	●	●	●	●		●	●	●	●

- Included
- Included (partial)
- Planned 2021
- Planned (future)

# Partner Access



Only vetted non-profit actors can access GVMM for global health purposes. GVMM uses a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International license



# Module #2: Demand

Demand for all vaccines for all countries 2000–2035, and partial information on campaign, outbreak and stockpile vaccines



**Demand**

## Contents:

- Global public demand for vaccines for the period 2000 through 2035
- Includes known new vaccine introductions and product replacements—includes some candidate vaccines (starting 2021)
- Special section on Covid-19 demand
- Private, traveler, military and hospital markets included (starting 2019, completing 2021)

## Notes:

- Combines data from:
  - WHO/UNICEF JRF
  - MI4A Vaccine Purchase Data
  - Gavi SDFs
  - UNPD WPP
  - Stochastic consensus vaccine introductions estimate
  - Media monitoring at <https://pharmanews.linksbridge.com>

# Module #3: Products and Supply

## Marketed and pipeline vaccines



### Contents:

- Vaccine products:
  - Pipeline
  - Marketed
  - PQ'd
  - Covid-19 pipeline and capacity
- Supplier:
  - Capacity
  - Time to market
  - PTRS discount

## Products and Supply

### Notes:

- Sources include:
  - Subscription data
  - Public procurement data
  - Weekly media monitoring
  - Company websites
  - Donor investments (mostly confidential)
  - Supplier validation (*Efficient Markets* project)

# Module #4: Pricing

Vaccines bought by major procurers and countries since 2000



## Contents:

- Pricing reference data 2000-2019
- GVMM pricing model 2020-2035 with price tiers as:
  - USA
  - Super HICs
  - HICs
  - UMICs
  - China
  - Other LMICs
  - India
  - PAHO
  - UNICEF
  - Private markets

## Pricing

## Notes:

- Sources include:
  - CDC
  - PAHO
  - UNICEF
  - MI4A (formerly V3P)
  - Company press releases and media monitoring
  - Country research for 17 countries including Brazil, Russia, India, China and South Africa
  - GVMM Private Markets module

# Module #5: Share

## Share of global and Gavi vaccine markets per company type



### Contents:

- Estimated share of global and Gavi vaccine market volumes and revenues in 2019 based on GVMM analysis

### Notes:









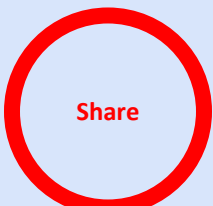
- Sources include:
  - Gavi public roadmaps
  - UNICEF market notes
  - MI4A market studies
  - Company financial reports
  - Media monitoring
  - Country lot release data
  - Donor information (confidential)
  - Supplier validation (through *Efficient Markets*)

**Share**



# Analytical Model (simplified, non-exhaustive)

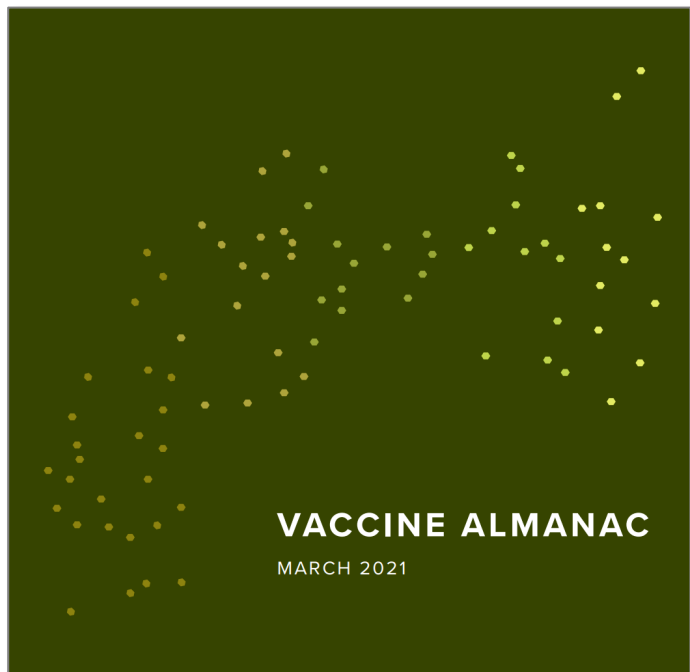
Combing different modules delivers different analyses from segmented country demand through franchise value—additional combinations are possible based on user needs

Module 1	Module 2	Module 4	Module 5	Result
				Segmented country demand
				Market Value
				Franchise Value

# Print and Online Versions

You can access GVMM as a semi-annual publication (March and September each year) and online (continuously updated)

## Print



## Online—enabled by Tableau Foundation grant (upgrade in 2021)

### Existing Users:

- Go to <https://data.linksbridge.com>
- Use your work email and password to login
- Contact [gvmm@linksbridge.com](mailto:gvmm@linksbridge.com) for any issues/questions

### New Users:

- Request access from [gvmm@linksbridge.com](mailto:gvmm@linksbridge.com)
- Go to <https://data.linksbridge.com/#/requestPasswordReset>
- Use your business email address as your Username and click “Send Password Reset Email”
- Look in your inbox (or Junk Email) for instructions for how to now login using a password of your choice



# Where does GVMM get resources and data from?

Entities contribute as financial or in-kind funders, as data collaborators, source data providers, and discounted subscription providers

## Funders/In-kind

BILL & MELINDA  
GATES foundation



**PATH**  
P O :: A O ♦ // 2 □ O

+ a b | e a u  
FOUNDATION

## Program Partners



Duke  
UNIVERSITY

**PATH**  
P O :: A O ♦ // 2 □ O

## Main Public Sources



## Subscription/Media



# GVMM Guiding Principles

**GVMM has operated by a simple set of guardrails since 2012**

- Free, forever for everyone qualifying to access
- No commercial access (DCVMs, MNCs limited based on partner sharing)
- Never the official view of BMGF, CHAI, Gavi, PAHO, PATH, UNICEF or WHO
- Managed by Linksbridge
- Reporting to BMGF/GDP (Global Health Strategy and VD&S also stakeholders)
- Advised from 2Q 2021 by Square Group:
  - Visibility to annual work plan
  - Twice-yearly status reporting
  - Opportunity to propose priorities

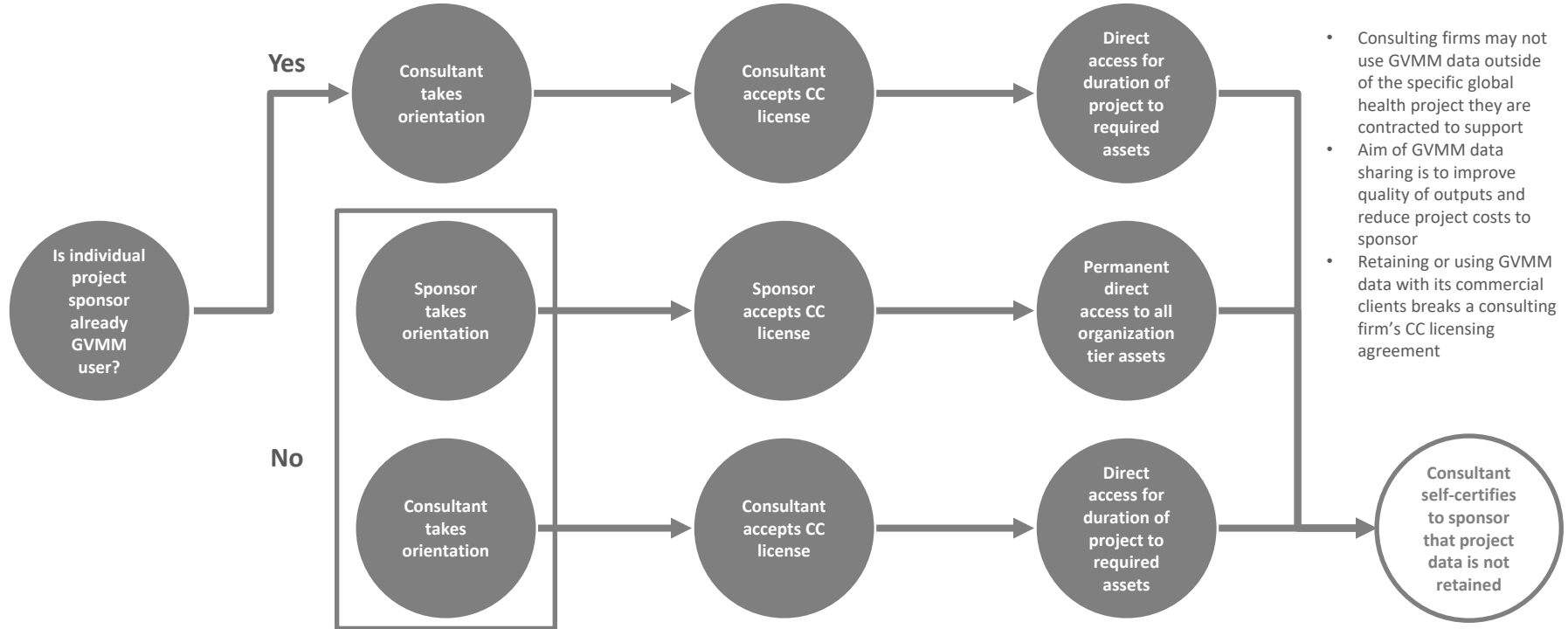
# Workplan

2021+ workplan improves user functionality, completes market scope, improves data sources, and considers opportunities to add non-vaccine markets

Functionality	Vaccines	Drugs, Diagnostics, Devices
<ul style="list-style-type: none"><li>• Agility CMS replaces Drupal/Acquia (1H 2021)</li><li>• Improved embedded analytics solution (1H 2021)</li><li>• Merger of <a href="https://data.linksbridge.com">https://data.linksbridge.com</a> and <a href="https://pharmanews.linksbridge.com">https://pharmanews.linksbridge.com</a> into single site (1H 2021)</li><li>• Improved structured and unstructured content search</li><li>• Domain-based automatic registration and user management</li></ul>	<ul style="list-style-type: none"><li>• Provide access to Private Markets module</li><li>• Complete adult vaccines</li><li>• Military markets</li><li>• Hospital markets</li><li>• Candidate vaccines</li><li>• Integrate Private Markets module into Demand module and Pricing module</li><li>• Broad consensus introduction dates</li><li>• Expanded in-country pricing research scope</li><li>• ML-informed price forecasting</li></ul>	<ul style="list-style-type: none"><li>• Integrate TB Drugs almanac</li><li>• Add HIV, malaria drugs markets (tbc)</li><li>• Create plan for CCE, Family Planning, MNCH markets</li></ul>

# GVMM Policy on Consulting Firms

Consulting firms working on global health projects may access GVMM if their project sponsor is (or becomes) a user, they accept CC license, and they self-certify no project data is retained (to avoid commercial use risk)



- Consulting firms may not use GVMM data outside of the specific global health project they are contracted to support
- Aim of GVMM data sharing is to improve quality of outputs and reduce project costs to sponsor
- Retaining or using GVMM data with its commercial clients breaks a consulting firm's CC licensing agreement



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