



Foundations of Market Shaping Webinar

Synthesizing best practices, approaches, and fundamental principles from across the global health market shaping field

June 18, 2024

Housekeeping



Please use the **chat** to introduce yourself.



Please use the **Q&A function** to submit questions to the presenters.



This webinar is being **recorded**. These slides and a link to the recording will be provided after this webinar to all registrants

Agenda & Speakers

Agenda Topic	Speaker
Introduction	Gaurvika Nayyar, Bill & Melinda Gates Foundation
FMS Overview	Dena Seabrook, Linksbridge
Case study: the New Nets Project	Tom McLean, IVCC; Kate Kolaczinski, The Global Fund; Kelsey Barrett, Unitaid
Closing remarks	Dena Seabrook, Linksbridge
Q&A (15 minutes)	

Meet Our Speakers



Gaurvika Nayyar
Senior Program Officer,
Bill & Melinda Gates
Foundation



Dena Seabrook
Director,
Linksbridge



Kate Kolaczinski
Senior Specialist,
Malaria,
The Global Fund



Kelsey Barrett
Technical Officer,
Strategy,
Unitaid



Tom McLean
Senior Advisor,
Innovative Vector
Control Consortium

Shifting context of market shaping

Shifting market contexts:

- 1 **More diverse players** with varying levels of experience
- 2 **Budding market fragmentation and regionalization**
- 3 **Increasing data asymmetry** and lack of access to consolidated market information
- 4 **Changing funder and capital landscape** for market shaping
- 5 Overall, there are opportunities to **strengthen our collective efforts** and avoid unintended consequences

Create new community needs:

- **Connection:** More **cross-learning and connection** on markets
- **Learning:** Support for **problem-solving and innovation** across product silos and with regional players
- **Data:** More **consolidated data and insights** across markets and suppliers for new market shapers
- **New financing instruments:** New **tools/mechanisms of capital and financing structures** in this “brave new world” of markets

Market Ecosystem Thought Leadership (META)

META GOALS



DESIRED OUTCOMES

In order to:

1. **Support healthy markets for improved health outcomes:** Enable existing and new market shapers to drive efficient market outcomes by demystifying the field and building market shaping skills among the expanded ecosystem of global, regional, and country market shapers
2. **Make optimal use of catalytic funds:** Ensure that market shaping efforts make the most efficient, data-driven, and impactful use of available capital and funding
3. **Drive innovation in market shaping intervention design:** Expand collaboration and learning across product classes, geographies, and organizational types to encourage innovative market shaping interventions
4. **Future-proof the field:** Develop innovation and talent to improve the market shaping ecosystem's resilience and responsiveness to future issues, fragmentation, and emergencies

META and Foundations of Market Shaping

META workstreams

Market Shaping Lookback¹

Foundations of Market Shaping
(FMS)

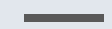
Global Health Market Shaping
Conference (GHMS)

Market Shaping University

Foundations of Market Shaping

A synthesis of the best practices, approaches, and fundamental principles for effective market shaping from across the field





Foundations of Market Shaping: content overview

FMS overview

WHY?

- Evolution of the field
- Siloed operations, proliferation of approaches and varied understanding of fundamentals
- Opportunity for greater alignment to improve collaboration

WHAT?

- FMS covers synthesized content from across the field, such as:
 - ✓ Critical fundamental concepts and best practices
 - ✓ Common attributes of healthy markets
 - ✓ Practical guidance for intervention planning and execution
 - ✓ Six Cs of an enabling operating environment
 - ✓ Market archetypes
 - ✓ Interventions playbook

HOW?

- Developed in collaboration with META Advisory Council, Market Shaping Network, and other key partners
- Considered one step in an ongoing effort

Good market shaping practices (1/3)



Fundamentals for success

1. A genuine market shaping opportunity exists
2. Market shaping actors understand the true need and potential demand for a product



Ensuring sustainable, mutual value

3. Accurate, impartial, symmetric market information enables informed decision-making by all
4. Differentiated risk and resource positions form the basis of mutually valuable agreements
5. Compared to other options, the intervention creates sustainable, positive, and mutual value for end-users, buyers, and sellers

Good market shaping practices (2/3)



Effective
execution

6. Individual interventions align with an overarching market shaping strategy based on strong market analytics
7. Actors working to shape a market follow an agreed-upon value chain that focuses on mutual success in accomplishing the market shaping strategy
8. Intervention teams have i) empowered, strong leadership, ii) discipline and clear structure, and iii) the necessary skills to succeed



Impact
achievement

9. Interventions are tracked all the way to impact, with course corrections made as appropriate
10. A named owner manages implementation and impact measurement

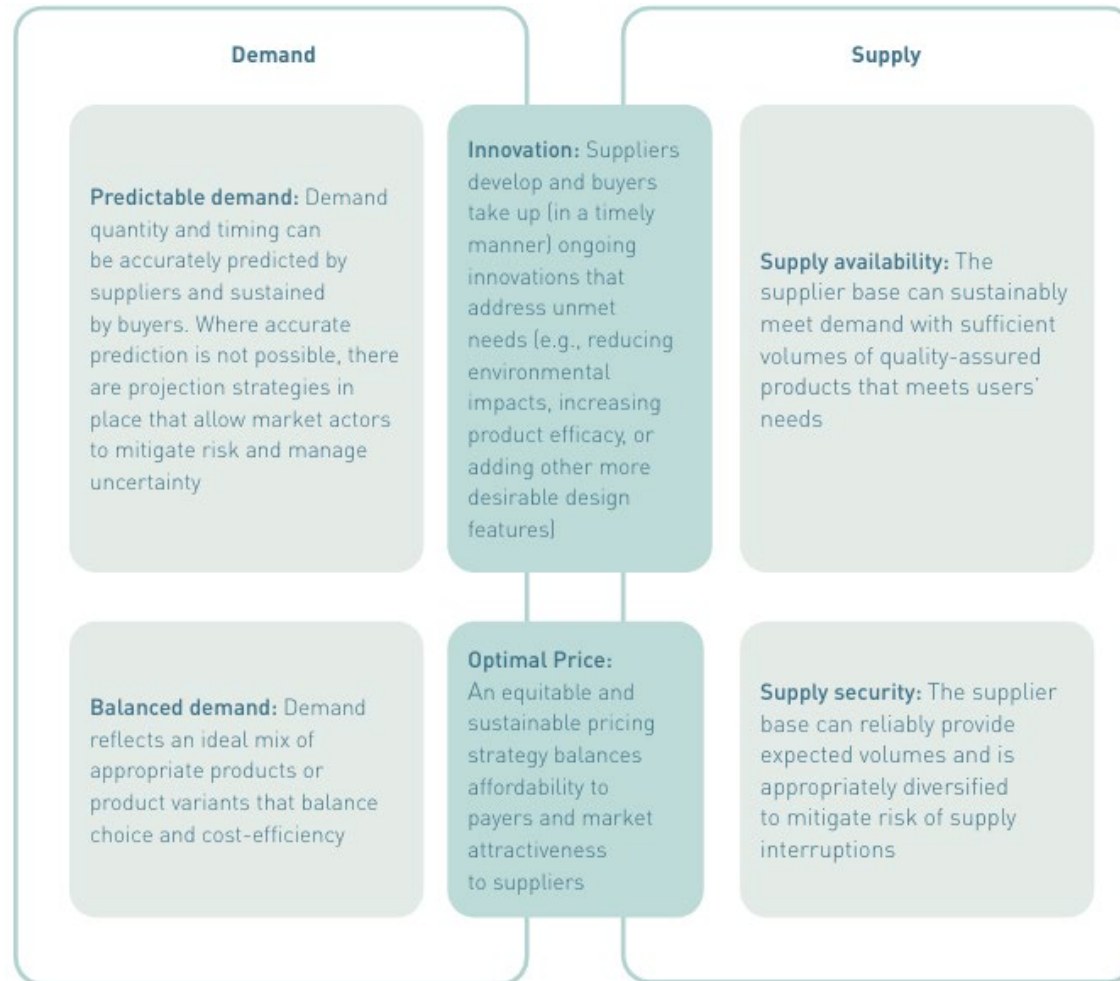
Good market shaping practices (3/3)



Transparency with partners

11. Global health actors engage all relevant stakeholders before, during, and after intervention execution
12. Global health actors share information about interventions, including their successes and challenges

Common attributes of healthy markets



- May differ slightly depending on the market
- Core attributes of healthy markets span demand- and supply-side factors

META Hub: a global public good

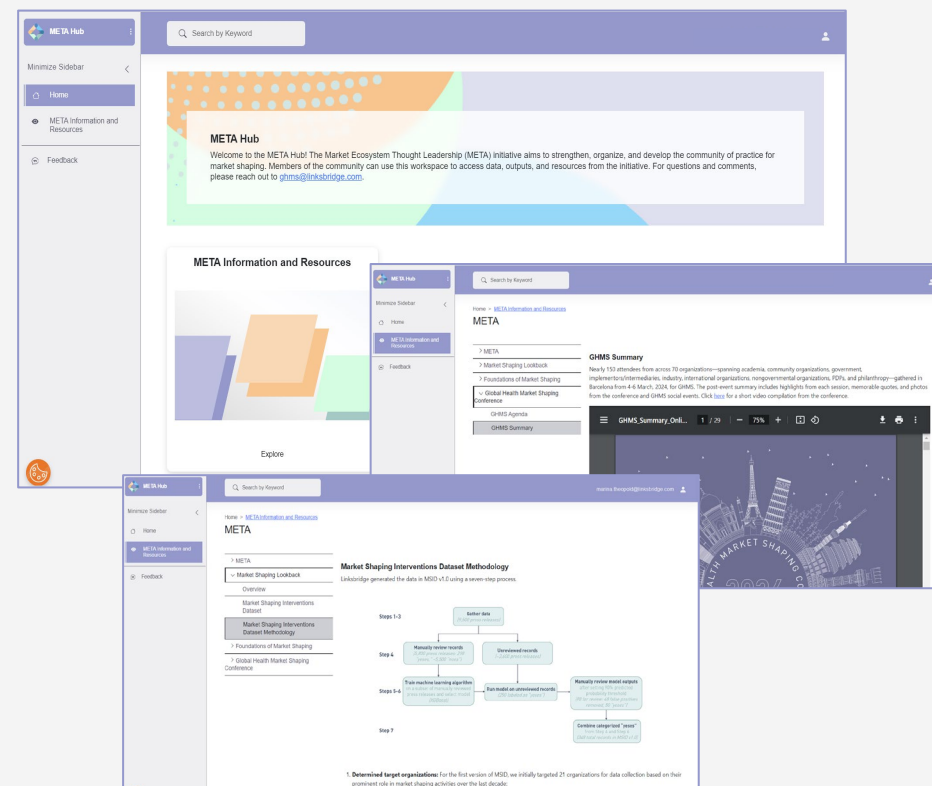
META products are available as global public goods on the [META Hub](https://meta.linksbridge.com), an online platform (meta.linksbridge.com)


The META Hub includes access to materials from several of the META initiative's key workstreams:

- **Market Shaping Lookback:** A 10-year review outlining the evolution of the global health market shaping field
 - Access to the Market Shaping Interventions Dataset (MSID) and an overview of the MSID methodology
- **Foundations of Market Shaping (FMS):** A synthesis of the best practices, approaches, and fundamental principles for effective market shaping from across the field
 - Access to English and French versions
- **Global Health Market Shaping Conference (GHMS):** Materials from a forum that brings together market shaping professionals to connect and learn across markets, disease areas, and product categories
 - Access to the GHMS agenda and post-event summary



Comments or questions? Please reach out to ghms@linksbridge.com.





Real-world example: New Nets Project

The New Nets Project: case study of a market shaping approach

Tom McLean - IVCC

Kelsey Barrett - Unitaid

Kate Kolaczinski - The Global Fund



Children in Maradi
Region, Niger /
Uncredited.

Overview

- 1. Design:** identifying the problem and designing the response - Tom McLean - IVCC
- 2. Implementation:** the New Nets Project
- Kelsey Barrett - Unitaid
- 3. Transition:** sustaining impact and market stability
- Kate Kolaczinski - The Global Fund

Links to key FMS content



Exemplifies FMS's *Fundamentals for Success* best practices (#1-3)



Exemplifies FMS's *Ensuring sustainable, mutual value and Effective execution* best practices (#4-8)

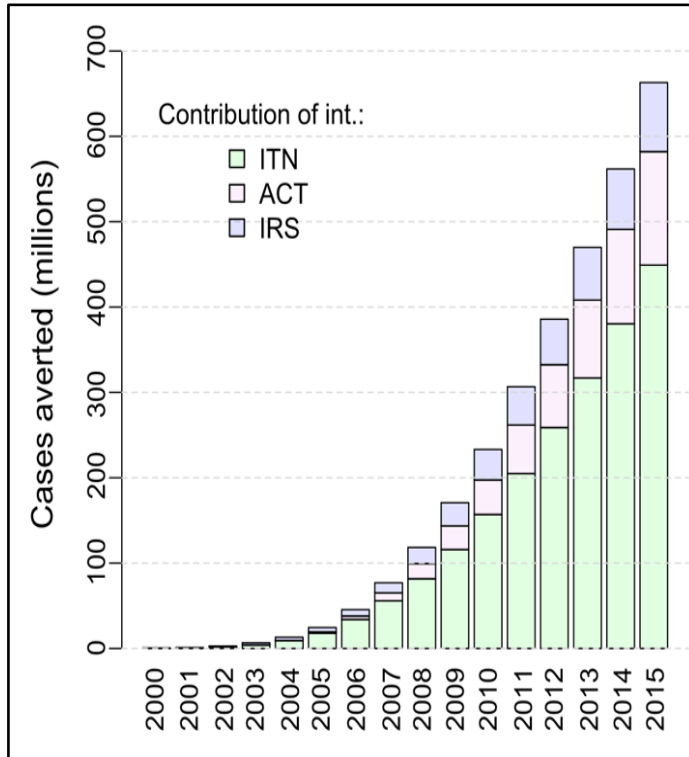


Exemplifies FMS's *Impact achievement and Transparency with partners* best practices (#9-12)

1. Design

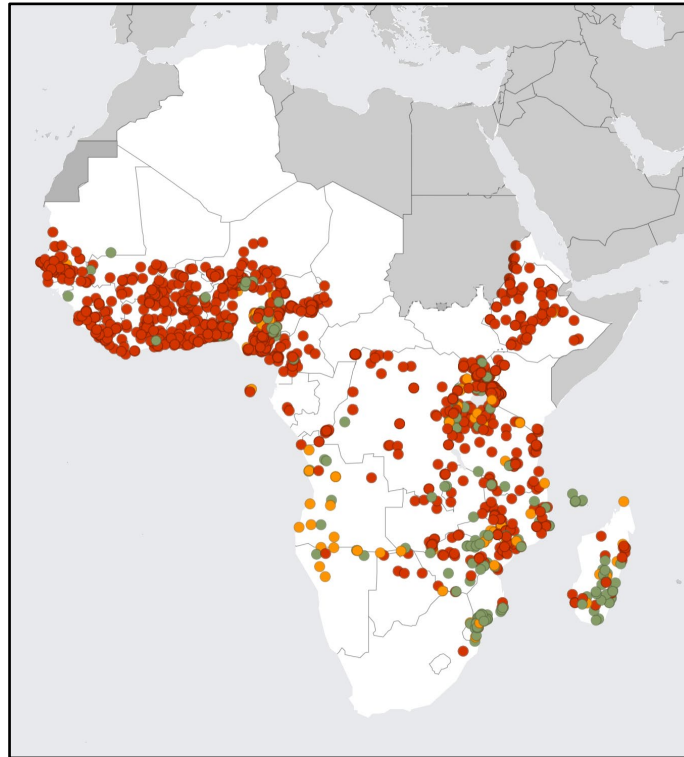
Why do we need new insecticides on bed nets ?

80% of malaria cases averted are due to Insecticide Treated Nets or Indoor Residual Sprays



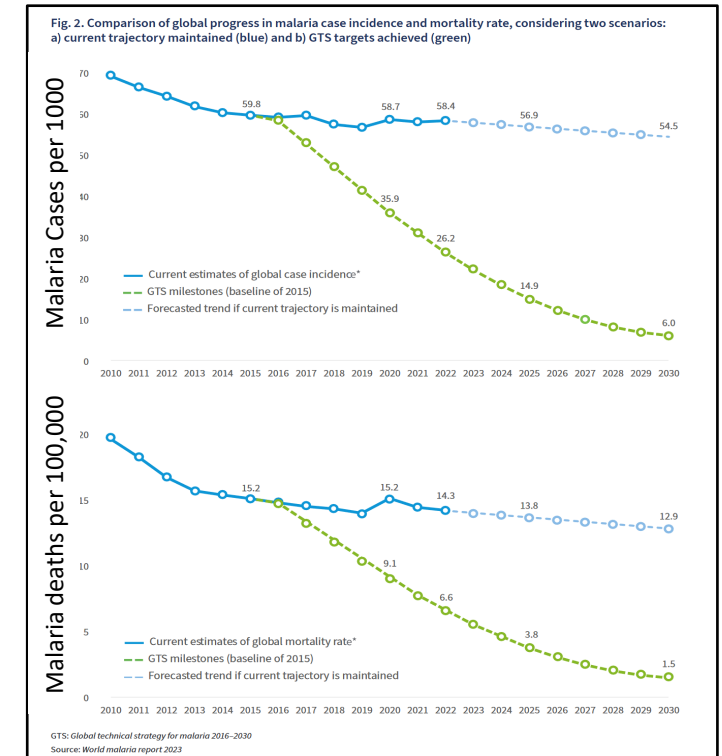
The effect of malaria control on Plasmodium falciparum in Africa between 2000 and 2015
S. Bhatt et al Nature. 2015 Oct 8; 526(7572): 207–211

Pyrethroid Insecticide Resistance has become widespread.



Malaria Threats Map, 2014-2024
World Health Organisation (WHO), accessed June 2024

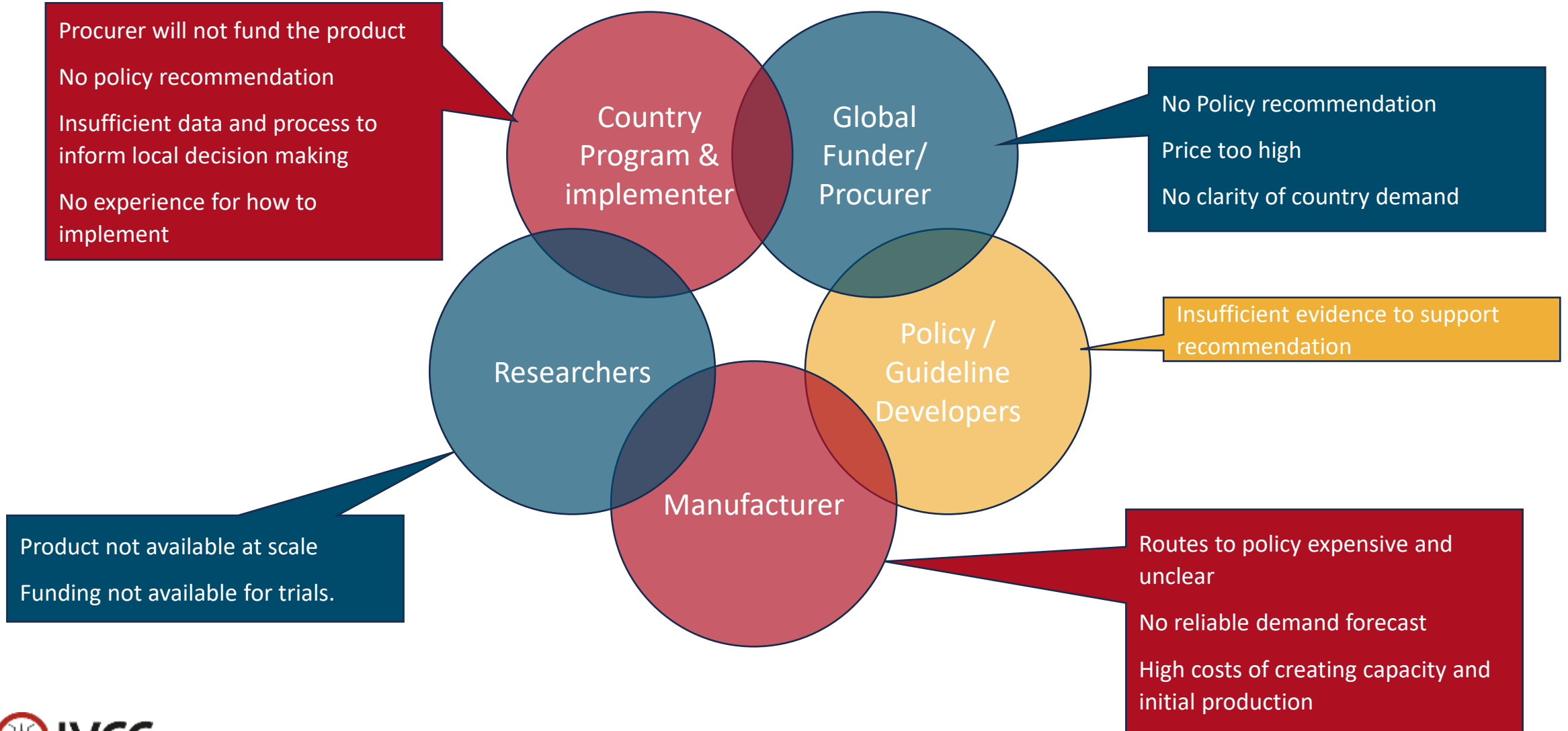
“Stalling progress in the reduction of malaria morbidity and mortality”



Global Malaria Programme operational strategy 2024-2030

Every stakeholder sees a different barrier to adoption

Previous innovation took 17 years to reach 50% uptake!



The New Nets Project market transformation



Status of Dual AI ITN market prior to NNP

Outcome of the NNP Project

New Nets Project partners

New Nets Project partners



- Lead and coordinator
- Liaison with industry partners
- Link to vector control product development pipeline



- Compilation of cross-country lessons learned from pilot studies, funding for process evaluations

The Alliance for
Malaria Prevention

- Technical assistance

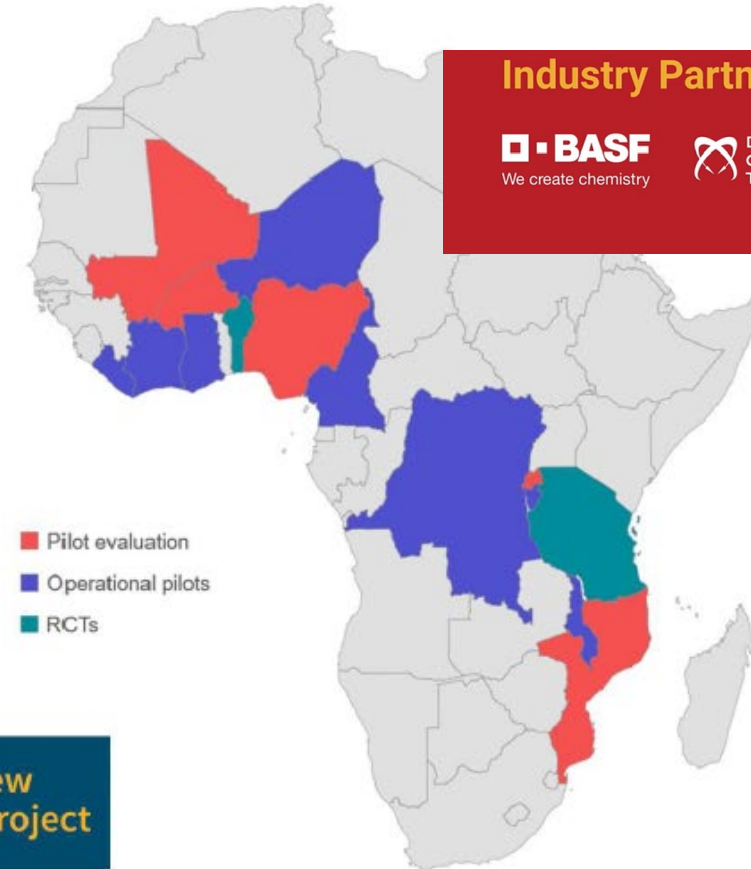
**Imperial College
London**

- Modelling of trials design and implementation impact

- Cost-effectiveness determination from pilot implementations

- Entomological correlates of epidemiological impact
- Cost effectiveness study design and data collection

- Cluster-randomized trials of dual active-ingredient ITNs and entomological correlates in trials



Industry Partners

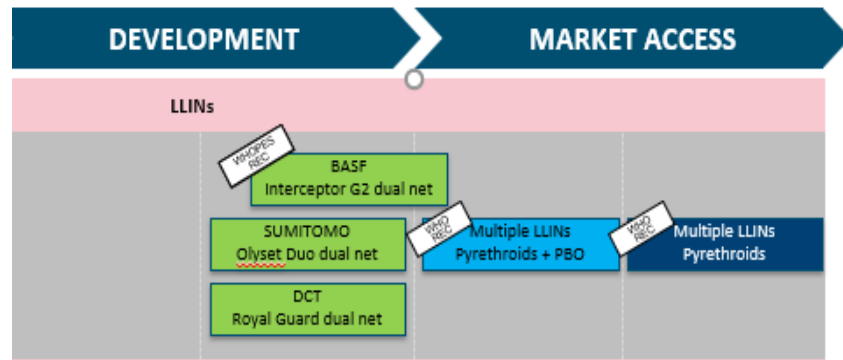


2. Implementation

The New Nets Project

Innovation: Next generation insecticide-treated nets

Bottlenecks



New requirement for costly & complex trials

Lengthy evaluation & registration processes

Higher price and limited evidence post-launch



- *Delayed entry, adoption*
- *Disincentivized R&D*

Comprehensive strategy

Product development

Global evaluation

Country registration

Procurement

Delivery & impact



Consortium Members

IVCC, PATH, PSI, LSHTM, AMP, Imperial, Tulane, LSTM



Co-Funders

Unitaid & Global Fund



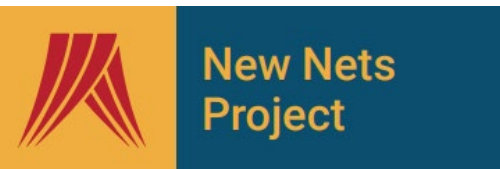
Grant value

US\$66 million



Countries

Implemented in 14 countries



New Nets Project: Pathway to impact

Market Barriers

Evidence gaps

- **Complete efficacy trials** and build the evidence base for a **WHO recommendation**

- ✓ IG2 (Chlorfenapyr-Py ITN) trial arm showed a **46% reduction in malaria incidence** compared to standard nets

Affordability

- **Time-limited co-payment mechanism** under NNP
- BMGF and MedAccess-funded **volume guarantee**

- ✓ Dual AI net **price reduction** to parity with PBO nets
- ✓ Dual AI **market share increased to 13% by 2022**

Supply and Delivery

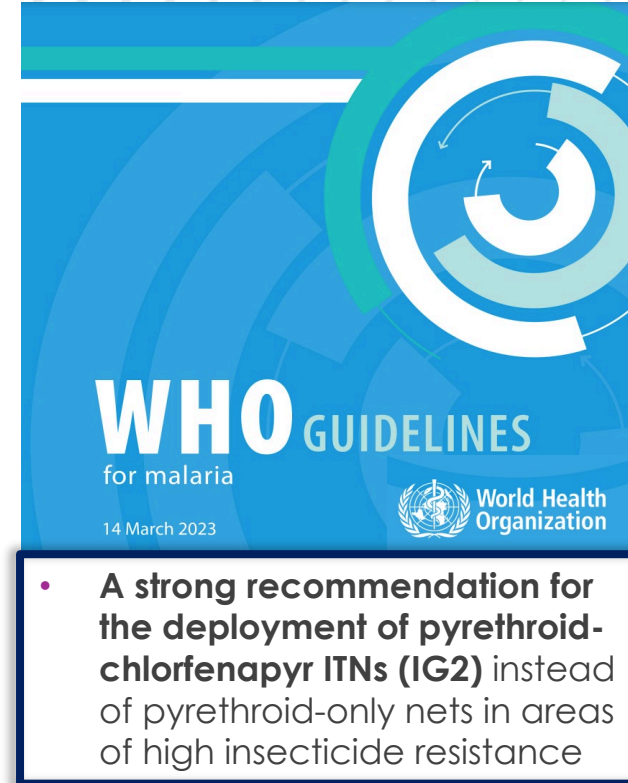
- Advance **in-country product registration**
- Generate **comparative cost-effectiveness** information

- ✓ IG2 nets were **registered in 26 countries**
- ✓ Dual AI production levels were scaled up

Demand, adoption and transition to scale-up

- **Operational research** to guide deployment decisions
- Product **procurement at scale**

- ✓ **Evidence of effectiveness and cost-effectiveness** in five pilot countries
- ✓ **65 million dual AI nets procured** through the co-payment mechanism



Impact

Imperial College modelled the Impact of dual-AI ITNs across the News Nets Project countries through the life of the project.

NNP copaid IG2 nets

- ✓ Malaria cases averted: **6 million**
- ✓ Malaria deaths averted: **11,815**
- ✓ Financial savings to health system: **\$17m**

NNP, NTI and PMI procurements

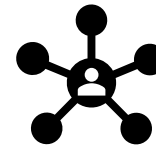
- ✓ Malaria cases averted: **13 million**
- ✓ Malaria deaths averted: **24,614**
- ✓ Financial savings to health system: **\$29m**

Five-year modelling projections, compared with standard pyrethroid nets

- ✓ Additional malaria cases averted: **38 million**
- ✓ Additional malaria deaths averted: **73,091**
- ✓ Financial savings of **\$99m**



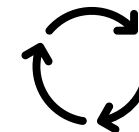
Lessons learned



Partner coordination



Country ownership and leadership



Market shaping challenges evolve and continue

3. Transition

Influences on sustainable scale up of innovative, higher price products

Supply side



Speed of new suppliers or products being prequalified and registered

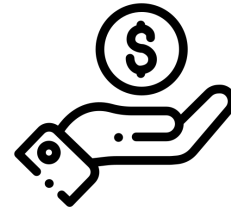


Supply capacity, especially if complicated by the uneven demand



Potential of **price increases** in existing products, and potentially higher market entry prices of new products

Demand side



Countries' **ability to pay** the 'full price' – especially after a co-pay



Evidence and decision-support on where the new product fits in – **relative cost-effectiveness** compared to wider toolkit



Perceptions on quality and performance

2019

2020

2021

2022

2023

2024

2025

New Nets Project

(\$66M total investment: Unitaid and Global Fund equal partnership)

Solving core barriers to market entry

Copayment support – access and supply capacity building

Evidence building – for WHO recommendation

 WHO recommendation

Net Transition Initiative

(\$50M total Global Fund investment)

Readying for scale up

Copayment support – continued access, faster prices reduction, supply capacity building to ready for generalized scale up

Evidence building – Data for programme decision making

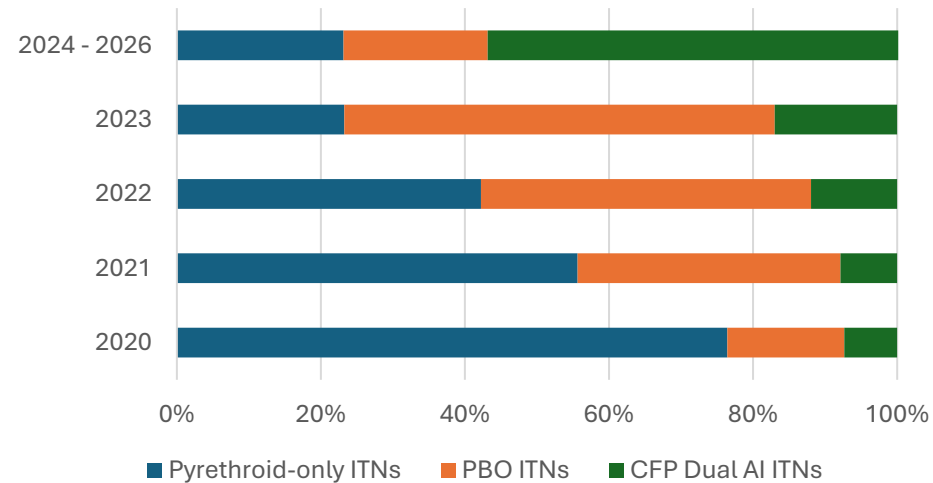
Wider procurement with ongoing strategic support

Enabling access at scale

Special contracting relationships underpinned by a Global Fund and Gates Foundation supported 'Revolving Facility' – commitment to procurement volumes

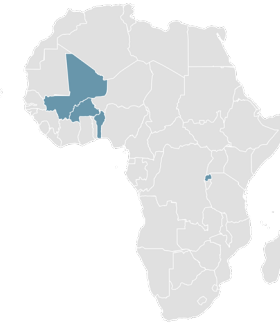
A purposeful sequence of evolving shaping approaches accelerated entry and scale up

Proportions of Global Fund financed ITNs of different types – actuals for 2020 – 2023; funded net types for 2024 - 2026

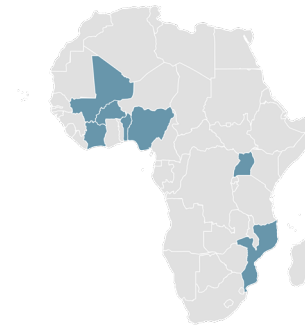


- - 7y from prequalification to 50% market share – down from 15y for previous product
- - 1y from WHO recommendation to 50% market share

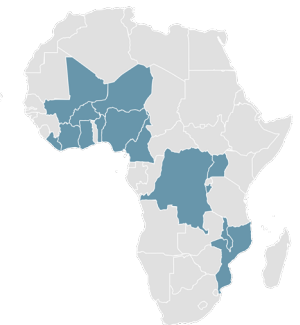
2019



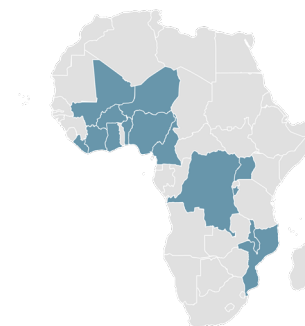
2020



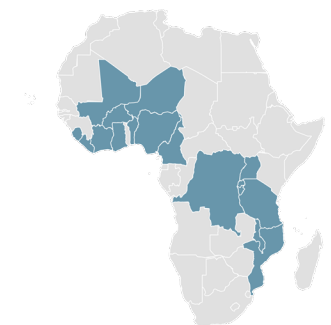
2021



2022



2023



Main take homes for market shaping success



Importance of wide partner engagement and buy-in; and not disrupting partnership space



Need to monitor and be flexible to changing context



Potential for impact is significantly increased by leveraging partner mandates/opportunities to trigger change




Transition and sustainability (i)
Strong local and programme engagement brings value
(ii) Importance of mitigating for unknowns in future context

Thank you



Umar Abdulhamid, delivering information
during a door-to-door mosquito net
distribution in Kano, Nigeria
The Global Fund/Andrew Esiebo/Panos



Question & Answer



THANK YOU

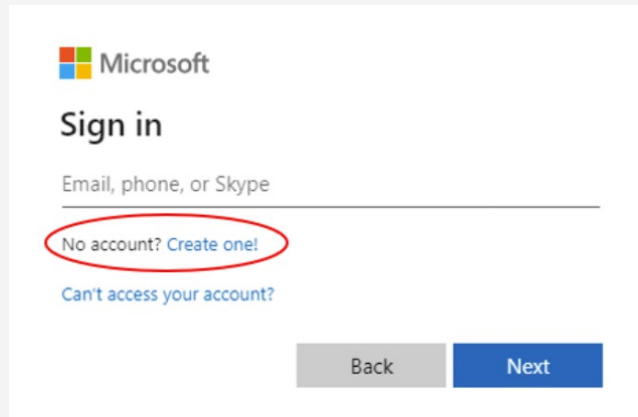
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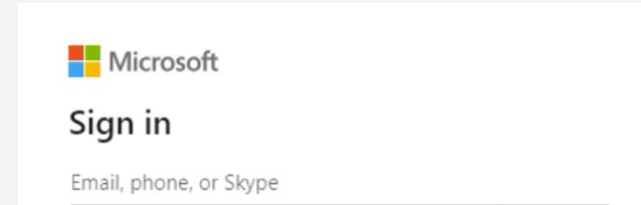
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