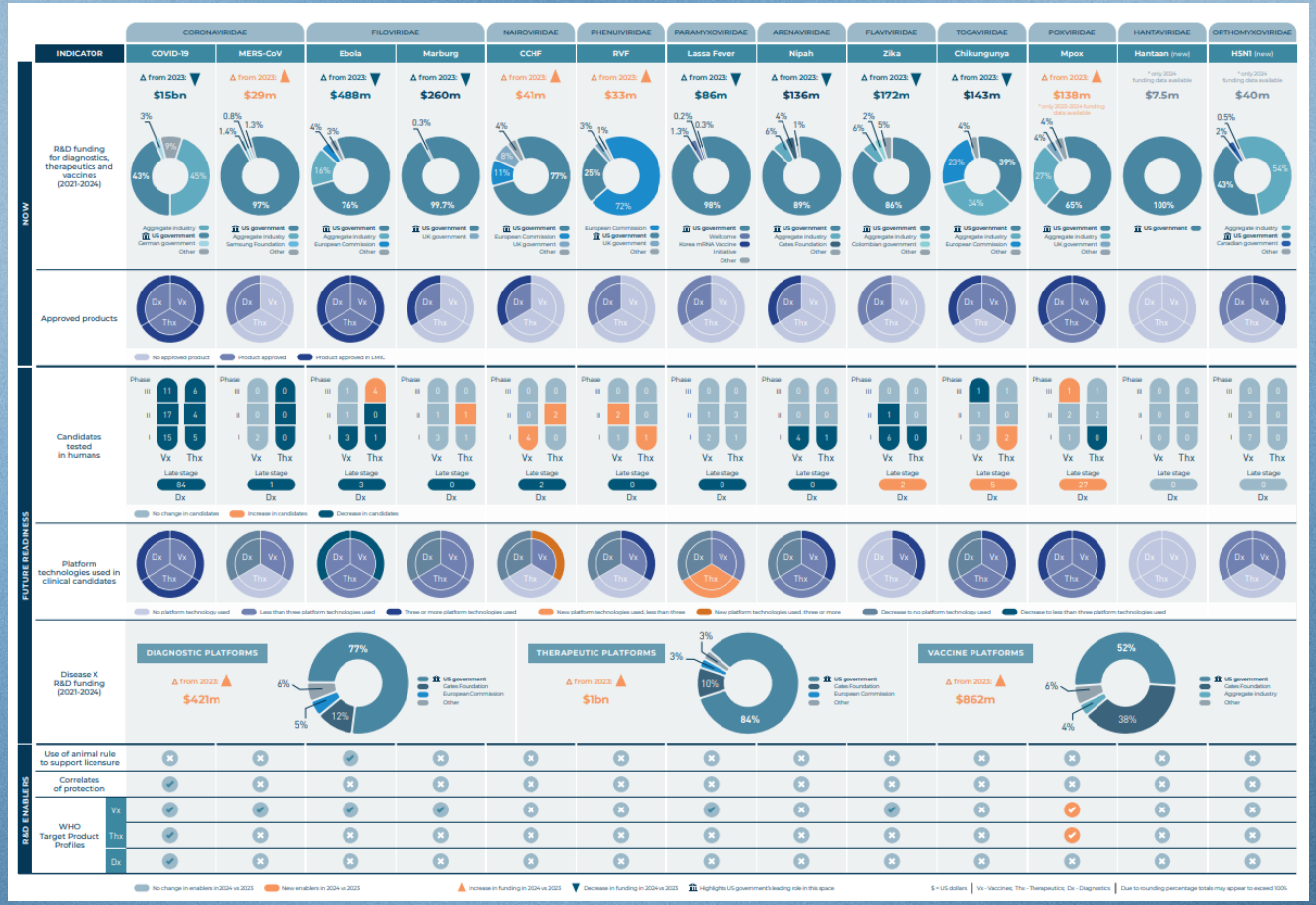
IPPS

International Pandemic Preparedness Secretariat

100 Days Mission

5th Implementation Report Visual Summary

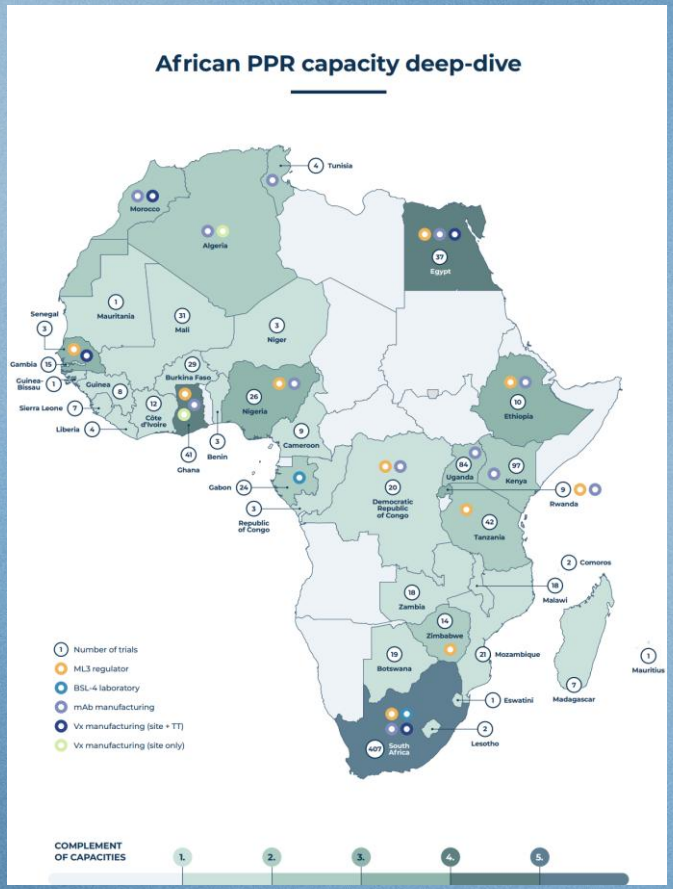
Scorecard 3.0



Key Messages

- **Limited progress** has been made in ecosystem remaining **reactive and reliant on US funding.**
- **R&D funding has declined** across most pathogens and product types (platform technologies remain resilient but USG funding dominated)
- **Therapeutics** represent critical gap - declining funding and contracting pipeline require immediate action
- **Pipeline stagnation** evident - most candidates arrested at Phase 1 with progression limited to early-stage transitions
- **Alternative pathways and R&D enablers underutilised**, constraining acceleration opportunities

African PPR Capacity Deep-Dive



Countries receive one point for each competency demonstrated, with total scores determining country shading intensity.

Key Messages

- **Clinical trial capacity is geographically clustered**, predominantly tethered to single institutions with external, high-income country sponsorship. A decisive shift toward African-led R&D and local principal investigators is needed.
- **Regulatory systems strengthened** post-COVID with additional ML3 designations, yet only two countries currently have the regulatory oversight of local vaccine production. Regional harmonisation initiatives and **AMA operationalisation** represent promising advancement
- Laboratory infrastructure is constrained with only **two operational BSL-4 facilities** and **limited formal inter-laboratory connectivity** hampering coordinated research capacity. A coordinated network of BSL-3 and BSL-4 sites is essential for effective regional pathogen detection.
- **Manufacturing capability emerging for vaccine and monoclonal antibody production**, though technology transfers and comprehensive capacity data remain critical bottlenecks
- Reaching 100DM objectives is not about every country building end-to-end capacity, but about **coordination** that leverages the regional "complement of capacities" to benefit the entire continent.

Synergies

Operationalising MCM Synergies Through Collaborative Models

WHO CORCs creating unified DTV platforms by viral family, BUT TPP development incomplete and cross-pillar knowledge sharing siloed

Cross-Functional R&D Infrastructure

Shared infrastructure opportunities (e.g. New Approach Methodologies) can accelerate all three tools, BUT coordinated development with harmonised standards needed

Biosecurity and Pandemic Preparedness

Investments mitigating deliberate threats simultaneously strengthen pandemic response, BUT bridging mechanisms between agencies weak

Harnessing Artificial Intelligence for Pandemic Preparedness

AI enabling anticipatory action building pathogen libraries inter-pandemically; transforming fragmented R&D into coherent ecosystem when responsibly governed

Innovative Cross-MCM Financing

Portfolio financing emerging (HERA, PAD Initiative) pooling resources across DTVs, BUT risk of reverting to siloed streams

The Path Forward: Sustaining Cross-MCM Coordination

- **Structural integration** through governance mechanisms that convene stakeholders in joint decision-making rather than parallel tracks.
- **Shared metrics** that assess system-level outcomes rather than tool-specific outputs.
- **Sustained, cross-cutting financing** to support common infrastructure, coordination, and data platforms.
- **Knowledge-management systems** that ensure insights from one domain are rapidly translated to others.

Diagnostics

2025 Priorities

- De-risk R&D and fund point-of-care tests
- Strengthen biobanking and sample access
- Expand sustainable capacity for regional manufacturing
- Simplify and harmonise diagnostic regulatory pathways
- Strengthen international coordination
- Embed best practices during interpandemic times

2025 Barriers

- R&D acceleration failures
- Sample access bottlenecks
- Regulatory fragmentation
- Manufacturing and supply chain vulnerabilities
- Financing barriers
- Cross-cutting structural weaknesses

2026 Priorities

- Develop coordinated approaches to support diagnostics developers with access to clinical samples, reference panels, and regulatory-aligned evaluation services (e.g. regional evaluation hubs)
- Accelerate diagnostic R&D for multiplex platforms embedded in routine care and establish mechanisms for integrated MCM development.
- Simplify and harmonise diagnostic regulatory pathways to reduce complexity, cost, and approval timeframes.
- Strengthen Agile Coordination to Address Critical Ecosystem Gaps.

Therapeutics

2025 Priorities

- Operationalisation of the Therapeutics Development Coalition
- Mapping of pipeline gaps to identify strategic funding opportunities
- Advancement of platform technologies and innovative approaches

2025 Barriers

- Inadequate incentives for private investment (push-pull incentives)
- Insufficient engagement with industry partners
- Reduced funding for therapeutics development
- Technological and manufacturing constraints further inhibit equitable access

2026 Priorities

- Operationalise the Therapeutics Development Coalition with focused proof-of-concept projects
- Diversify and sustain financing through blended models that combine public, philanthropic, and private investment to fund translational R&D
- Promote responsible innovation through sustained investment in platform technologies and equitable access frameworks

Vaccines

2025 Priorities

- Advance clinical development of vaccine candidates for priority viral families
- Sustain investment in development of a diverse range of existing and novel vaccine platform technologies
- Identifying investment gaps in vaccine candidates and platform technologies
- Establishing and implementing economic risk-sharing models

2025 Barriers

- Funding volatility and concentration
- Regulatory capacity remains uneven
- Manufacturing and supply chain vulnerabilities
- Vaccine hesitancy and misinformation

2026 Priorities

- Address critical gaps in the clinical pipeline through diversified, coordinated investment and development
- Accelerate regulatory innovation beyond outbreak contexts, operationalise frameworks for correlates of protection
- Advance fit-for-purpose and equitable platform technologies and integration into regional manufacturing initiatives
- Rebuild vaccine confidence through transparency and community engagement from early R&D stages

Enablers – 2026 Priorities

Clinical Trials

- Operationalise Regional Trial Networks and Shared Governance
- Scale Preparatory Trial Innovations
- Ensure Sustainable Financing and Workforce Development

Regulatory Systems

- Strengthen Regional Harmonisation and Reliance Pathways
- Scale Preparatory Regulatory Innovations
- Promote Regulatory Equity and Mutual Recognition

Surveillance

- Strengthen Surveillance-Response Integration
- Sustain LMIC Capacity Building
- Promote One Health Surveillance

Geo-diversified Manufacturing

- Strengthen Market and Financing Mechanisms for Regional Production
- Advance Regional Manufacturing through Platform Development
- Accelerate Regional Regulatory Harmonisation

Finance, Governance and Forward Look

Finance

- Integrate Day Zero Triggers into Decision Making
- Mobilise Domestic and Non-ODA Resources
- Secure Sustainable Financing
- Advance Innovative Financing Models
- Strengthen MDB Capabilities
- Enhance Data Systems

Governance

- Conclude PABS Annex Negotiations
- Strengthen Advocacy and Civil Society Engagement
- Integrate Governance Frameworks
- Counter Mis/Disinformation

Forward Look

- 2026 UN High-Level Meeting on PPPR – political commitment opportunity
- PABS completion and G20/G7 uncertainty create urgency
- Monitoring fragmentation with IPPS/GPMB sunsetting in 2026-27: clear appetite for consolidated framework

  IPPS championing as key HLM outcome to ensure 100DM Scorecard continuity

Priority Action Areas for 2026

1

Operationalise the Therapeutics Development Coalition through proof-of-concept projects for priority viral families

Permanent governance by end-2026; proof-of-concept for 2 viral families;
diversified financing; equitable access integration

2

Collaborate with partners in the diagnostics ecosystem to enhance coordination and implement recommendations from the 2025 Global Diagnostics Gap Assessment

Implement Gap Assessment recommendations; regional evaluation hubs;
finalise PABS (May 2026); embed in routine healthcare; harmonise regulatory pathways

3

Agree to a sustainable, coordinated, consolidated approach to monitoring across pandemic prevention, preparedness and response to ensure continuity of the Scorecard beyond IPPS mandate

Explore options to establish a coherent PPPR monitoring mechanism that consolidates existing fragmenting mechanisms (IPPS/GPMB sunsetting); leverage 2026 UN HLM for Member State endorsement; align with PABS negotiations.

4

Highlight continued need for vaccine investment, and maintain engagement with vaccine partners to leverage synergies and ensure alignment across Dx, Tx and vaccines

Maintain close alignment with vaccine partners to ensure advances across diagnostics, therapeutics and vaccines continue to reinforce each another, and synergies can be maximised.